2009

ANNUAL REPORT

avec

Association of Poultry Processors and Poultry Trade in the EU Countries - ASBL
Association de l'Aviculture, de l'Industrie et du Commerce de Volailles dans les Pays de l'Union Européenne - ASBL

AVEC secretariat
Rue du Luxembourg 47-51
B-1050 Brussels
Belgium
Phone +32 2 238 10 82/83
Fax +32 2 238 10 84

Secretary General:
Tage Lysgaard
tl@poultry.dk

Director:
Cees Vermeeren
cv@avec-poultry.eu

Policy Adviser:
Marianne Nichols
mn@avec-poultry.eu

e-mail: avec@avec-poultry.eu
web: www.avec-poultry.eu

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INTRODUCTION BY THE PRESIDENT AND THE SECRETARY GENERAL

In the midst of a global financial crisis marked by fluctuating commodity prices and fears of accelerating climate change **avec**, working on behalf of the European poultry industry, is proud to represent the most environmental friendly and sustainable of all the meat sectors.

During economic crisis the purchasing power of consumers drops, challenging society's good intentions and growing interest in buying “green and environmental friendly” products. **avec**, supported by scientific research is pleased to record that European conventional poultry production is very safe for both consumers and for the environment. Poultry has a short life cycle and consumes relatively little feed with minimal impact on the environment. Farmers and processors ensure the safety of the final product reaching the consumer.

For this reason it is not surprising that the outlook for the European poultry production remains positive. Production and consumption are expected to increase by respectively 8 and 9 percent by 2015.

However, imports are also expected to grow and **avec** remains firm in its request to the European Commission that poultry meat imported to the European Union from third countries must be produced under EU equivalent conditions, respecting feed and food safety, animal health and welfare, and the environment, and be accompanied by a certificate of conformity.

The European poultry industry observes strict biosecurity measures in the food chain from farm to fork and the European poultry industry does not need antimicrobial treatments (AMT) to remove surface contamination. In December 2008 **avec** noted with pleasure that 26 of 27 European Ministers of Agriculture and Food supported **avec**' s position.

The European surveillance and notification system continues to manage the effects of outbreaks of AI and ND. In 2009 so far H5N1 has only been detected in a mallard in Germany. The Czech Republic, France and Italy had outbreaks of LPAI H5 in poultry and turkey. There have been a few cases of Newcastle disease reported in Belgium and the Netherlands in wild pigeons, and in poultry in Bulgaria.

In close cooperation with the European institutions and other stakeholders **avec** is actively involved in various legislative proposals e.g. labeling of food and revisions of current regulations on Salmonella, hygiene, welfare of animals at the time of killing and during transport, animal by-products, and marketing standards for poultry. In trade discussions, especially on TRQs, **avec** is closely following the next steps of the WTO/DOHA negotiations, stating its preferences on sensitive products and defending European poultry interests.

avec joins other stakeholders like CLITRAVI, COPA-COGECA, EFPRA, FEFAC, FVE and UECBV on issues of common interest such as the feed ban, GM thresholds in feed, and Salmonella criteria for poultry.

On a global scale **avec** contributes to and participates in the work of the International Poultry Council, established in October 2005. IPC represents poultry interests on a global basis and more countries are joining the IPC every year. IPC is recognised by a number of official organisations including the OIE, FAO and CODEX.

In 2009 the representation of the European Parliament and the European Commission will change. Cooperation at the European level represents challenges that **avec**, representing the European Poultry Industry, is convinced it will manage to the benefit and best interest of its members and the European consumers.

Aldo Muraro
President

Tage Lysgaard
Secretary General

AVEC CONTENTS

Poultry meat the future, consumers, energy, environment

AVEC – OUR ASSOCIATION

WHO ARE WE?

avec is a voluntary, non-profit association created in 1966. As a European unit **avec** represents and promotes the interests of the European poultry sector. Our members are national organisations representing poultry processors and poultry trade in 17 EU countries.

avec influences the drafting of EU legislation, which have consequences for the industry and for the EU consumers and does its utmost to improve the established, strong cooperation with the different services of the European Commission as well as with the Parliament. When the Lisbon treaty enters into force the European Parliament will have co-decision on a number of issues of interest to the poultry industry and **avec** keeps good relations with the changing MEPs, a relationship that has proved rewarding.

OBJECTIVES

The main objectives of **avec** are to promote and defend the interests of the members, to find solutions to common issues, and to create a level playing field with common international rules and standards. The aim is to represent a strong and united European poultry industry by cooperating and keeping close contact to our member organisations and by maintaining and developing strong relations with the European Union, international organisations and partners.

By promoting the interests of the European poultry meat sector as a united organisation, we represent a strong and dynamic entity prepared to handle the present and future challenges of our industry.

ADMINISTRATIVE STRUCTURE

From January 2005 **avec**'s secretariat has been permanently based in Brussels and managed by Cees Vermeeren, director, and added a policy adviser to the staff from January 2007. From 1973 to 2005 the secretariat was based in Copenhagen and managed by the Secretary General of **avec**, Tage Lysgaard.

On a daily basis the secretariat of **avec** gathers and distributes information on current issues to the member organisations and communicates with the European institutions and other partners. **avec** is also intermediary and adviser to its member organisations.

THE PRESIDENCY AND THE BOARD

Aldo Muraro president of the Italian poultry association UNA, is elected in 2008 president of **avec**. The president leads board meetings and the General Assembly and he assists the secretariat in its daily work whenever possible.

avec has three vice-presidents, Jan Odink from NEPLUVI in the Netherlands, Federico Felix from Propollo/AMACO in Spain and Paul Heinz Wesjohann of the German BVG. The presidency and vice-presidency are for election every two years and are renewable.

avec member organisations are represented in the Board by one Board Member and one deputy Board Member. Board meetings are held four times per year. Since 2008 **avec** organises an annual reception in connection with the first board meeting to facilitate an exchange of views between board members and officials from the Commission and other stakeholders. Commission experts are called in to attend the board and working group meetings whenever their presence is estimated necessary. The General Assembly takes place on a yearly basis, usually in September or October, and up to 200 delegates participate. Speakers from the industry, the EU institutions, and from other international organisations are invited to give their views on key issues relevant to the poultry sector.

avec is a voluntary, non-profit association created in 1966.
avec represents and promotes the interests of the European poultry sector.

WHO ARE OUR MEMBERS?

avec represents the majority of poultry interests in the European Union. Our members are national organisations representing poultry companies, processors and slaughterhouses. Currently, we have 19 members from 17 of the EU Member States, representing approximately 90% of the European poultry meat production.

The members participate in the daily work of **avec**. They help to find compromises between different national interests, to formulate common positions, and to bring these positions forward to the relevant decision makers through national contacts.

OUR MEMBERS ARE:

BELGIUM
V.I.P. – België – Vereniging van Industriële Pluimveeslachterijen van België

CZECH REPUBLIC
Sdruženi Drubezarskych Podniku

DENMARK
DSF – Dansk Slagtefjerkræ

FINLAND
Suomen Broileriteollisuusyhdistys

FRANCE
FIA – Fédération des Industries Avicoles
CIDEF – Comité Interprofessionnel de la Dinde

GERMANY
Bundesverband der Geflügelschlachtereien e.V.

GREECE
Sindesmos Ptinotrofikon Epihiriseon Hellados

HUNGARY
Baromfi Termék Tanács

ITALY
UNA – Unione Nazionale dell'Avicoltura

NETHERLANDS
NEPLUVI – Vereniging van de Nederlandse Pluimveeverwerkende Industrie

POLAND
KRD – Krajowa Rada Drobiarstwa

PORTUGAL
ANCAVE – Associação Nacional dos Centros de Abate e Indústrias Transformadoras de Carne de Aves

ROMANIA
Uniunea Crescatorilor de Pasari din Romania

SLOVENIA
GIZ Mesne Industrije

SPAIN
AMACO – Asociación Nacional de Mataderos de Aves Conejos y Salas de Despiece
PROPOLLO – Organización Interprofesional de la Avicultura de Carne de Pollo del Reino de España

SWEDEN
Svensk Fågel

UNITED KINGDOM
BPC – British Poultry Council

avec

Pro Pollo

NEPLUVI

UNA

SVENSK FÅGEL

VIP - BELGIE

bpc

FIA

Baromfi Termék Tanács

ETL

BVG

KRD
Izba Gospodarcza

GIZ
Mesne industrije

Uniunea Crescătorilor de Păsări din România
UCPR

ancave

EU AND INTERNATIONAL KEY PARTNERS

avec cooperates with many other international organisations depending on the issues at stake. **avec** has regular contacts with other stakeholders in the agricultural food sector, in particular with the meat sector. Exchange of views with other involved stakeholders on technical and strategic issues can be very useful.

avec has a beneficial communication and cooperation with **COPA-COGECA**, the *Committee of Professional Agricultural Organisations* and *General Confederation of Agricultural Cooperatives in the European Union*. Together **avec** and **COPA-COGECA** have drafted some common positions and letters to the EU institutions and lately drafted a Community guide on good hygiene practice to be published in 2009.

Depending on the issues, **avec** also cooperates with **CLITRAVI**, the *Liaison Centre for the Meat Processing Industry in the European Union*, **UECBV**, the *European Livestock and Meat Trading Union*, **FEFAC**, the *European Feed Manufacturers' Federation*, **IFAH**, the *International Federation for Animal Health*, **EFPRA**, the *European Fat Processors and Renderers Association* and **EUROCOMMERCE** *association for retail, wholesale and international trade interests*.

For example, **avec** is currently working with COPA-COGECA and EUROCOMMERCE on the Salmonella criteria absence in 25 g laid down in Regulation 2160/2003.

avec has become a "European Poultry House". From 2007 the secretariat of **AEH**, the *Association of European Hatcheries* and the secretariat of **EPEXA**, the *European Organisation for Exporters of day-old chicks and hatching eggs* share the secretariat of **avec**. In April 2008 the **EPB**, the *European Poultry Breeders*, also joined. The operators in all stages of the poultry production chain in Europe are closely collaborating. They are profiting from this unique situation by the sharing of knowledge on common poultry issues which strengthens the efforts to improve the global competitiveness.

AVEC, A MEMBER OF THE INTERNATIONAL POULTRY COUNCIL

On 7 October 2005, delegates from Argentine, Brazil, Canada, Chile, China, Egypt, the EU, Mexico, Thailand, Turkey and the USA founded the International Poultry Council - IPC. Today, the IPC gathers the leading organisations from those countries as well as Australia, Germany, Columbia, Honduras, Italy, Nicaragua, Peru, Russia, Spain, United Kingdom, Ukraine, Vietnam and New Zealand. IPC has associate members from Denmark, Germany, Pakistan, the Netherlands and the USA.

The mission of the IPC is to strengthen communication, eliminate misunderstandings, and promote cooperation among its members, as well as to influence and promote the development of an international level playing field.

The main objectives include encouragement of the development and application of uniform and science based international sanitary and marketing standards for poultry; promotion of technical cooperation and exchange of science-based principles between national authorities; promotion of transparency of governmental policies affecting poultry in all countries; and maintenance of a dialogue with relevant international organisations such as the OIE, Codex Alimentarius, the FAO and the WTO.

At the 2009 IPC Spring meeting in Rome it was decided to establish an expert panel with representatives from the IPC member organisations, who - on an ad hoc basis - can contribute to and participate in meetings and working groups established by the above organisations within the fields of:

- Food safety
- Livestock/Animal health
- Animal welfare
- Compartmentalisation

Facts about the IPC :

- Founded on 7 October 2005
- Official seat: 184, Rue de Vaugirard, 75015 Paris, France
- President: Mr. James H. Sumner, USAPEEC
- 1. Vice-president: Mr. Tage. Lysgaard, **avec**,
- 2. Vice-president: Mr. Ricardo Santin, ABEF, Brazil
- Treasurer: Mr. Cesar de Anda, UNA, Mexico
- Members-at-large: Dr. Mohamed El-Sharfei, EPPA, Egypt
Mr. Wang Xiu Lin, CFNA, China

Represents more than 80% of world broiler production and about 95% of world poultry trade.

Recent IPC Conferences:

- o *Madrid*, Spain, 2008
- o *Beijing*, China, 2008
- o *Rome*, Italy, 2009

- Upcoming Oct.2009: o *Sydney*, Australia, 2009

OIE – IPC agreement in May 2008

In April 2008 IPC was informed that the OIE-IPC Agreement had been approved by the Administrative Commission of the OIE. During the OIE Delegates' 76th Assembly in May 2008 the Agreement between the OIE (World Organisation for Animal Health) and the IPC (the International Poultry Council) was signed by Director General of the OIE, Dr. Bernard Vallat and IPC First Vice President Tage Lysgaard.

IPC is pleased to enter into a close and constructive cooperation with OIE. IPC and OIE share many issues of common interest: provision of general information on the poultry sector on veterinary issues, cooperation and development and revision of international animal health and zoonoses standards, cooperation in the development and promotion of science-based international animal welfare standards relevant to international trade, exchange of views on the approach by intergovernmental bodies such as the WHO, FAO and their subsidiary body on disease surveillance and control strategies, food safety and exchange of views and participation in meetings on relevant aspects of animal health and zoonoses, animal welfare and food safety. IPC Membership of FAO and Codex Alimentarius pending.

AVEC FOCUS

This section gives an overview of the main themes **avec** is working with in 2008-2009. You will find a more general description of the issues at stake combined with a brief outline of **avec**'s position in relation to each issue, drawing up the lines for future actions. For more information on the different subjects, we invite you to visit our web site where you can find our position papers and other information:

www.avec-poultry.eu

POULTRY MEAT THE FUTURE, CONSUMERS, ENERGY, ENVIRONMENT

In 2009 the world economy entered the worst economic recession for 60 years. The political and financial effects of climate change put further pressure on food production. In European poultry production the impact has been on

- Consumers' spending patterns and consumer concern for environment
- Political concern about climate change and consequent impacts on the industry
- Population growth and global demand for feed and fuel
- Poultry meat industry investments, takeovers and consolidations
- Increased trade protectionism and currency instability

Scientific evidence from a study by JRC IMPRO[1] in 2008 and a DEFRA/Cranfield study[2] from 2006 proves that chicken produced from conventional farming, respecting high European standards of animal welfare, health, hygiene and environmental protection is the most efficient and environmental friendly of meat productions, with significantly lower green-house gas emissions than even organic chicken production.

For this reason **avec**, supported by the Commission's own forecasts[3], is confident that long term demand for poultry meat will grow. Consumer preferences will shift to poultry meat - conventionally produced chicken meat is a healthy, inexpensive and environmental friendly source of protein.

Sustainable production of poultry meat

The EU Commission's Joint Research Centre (JRC) published in March 2008 a study on the environmental improvement potential of meat and dairy products.

The study confirms that of the four largest livestock sectors (dairy, beef, pork and poultry meat), poultry meat has the least impact on the environment in the EU per kilogramme of meat produced. Across a range of impacts poultry meat was between 5% to10% of the total impact for the four sectors combined, whereas for beef and pork the impact is much greater, ranging from 16% to 39% and from 19% to 44% respectively. A Defra/Cranfield study concludes that poultry has very efficient feed conversion, high daily weight gain combined with a short growth period which contributes to its overall efficiency and environmental friendliness.

Activities on sustainable production

The growing concerns about scarcity of natural resources and costs for raw materials, made the EU Commission look for ways to decrease the resource impact of industrial activity and consumption patterns. The Commission's Communication on the strategy for the sustainable use of natural resources (2005) has been followed by Action Plans on sustainable consumption and production in July 2008.

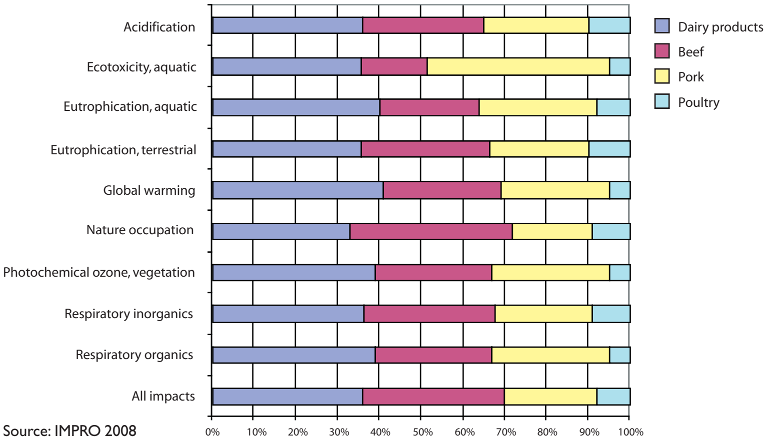
In March 2009 the Commission launched a Retail Forum to promote more sustainable consumption with the European Retail Sector. The retailers are to promote more environmentally sustainable products to the EU consumer.

In response to this Forum, the European farmers and food industry launched in May a Round Table with participation of **avec** and other stakeholders. The objective is to establish by 2011 scientifically reliable environmental assessment methodologies for food and drink products and to identify suitable means of voluntary communication to consumers. The Round Table is co-chaired by the EU Commission.

A Round Table on “responsible soy production” was established in 2004 by producers, industry, trade and civil society organisations. The aim is to create a global standard for responsible soy production. **avec** has participated in meetings in 2009 as an observer.

avec is following these initiatives closely. The overall aim is to provide consumers with reliable information on the real sustainable value of the meat they buy. A common reference system to assess life cycle impacts of products must be developed before this information is available.

Environmental impacts: relative contribution of the four main product groups



Source: IMPRO 2008

Consumer trends in the EU

DG SANCO's mission is to make "Europe's citizens healthier, safer and more confident." It is evident that consumers want to be healthier, safer and more confident - but how do consumers translate these objectives into their everyday shopping choices in the supermarkets?

Experience shows that it is essential to listen to consumers themselves and not to the few who seek to change them through sensational publicity. In some EU Member States poultry producers and retailers have been under great pressure from "celebrity chefs" and vocal lobby groups who want only particular farming systems used to produce poultry meat. Many producers and retailers followed the celebrities and turned to free-range and organic farming the demand fell away as quickly as it had been artificially increased and has been further affected by the financial crisis. Organic farmers have asked their governments for a derogation to move away from strict organic standards if they were to survive the recession. The request focused in particular on the use of levels of non-organic raw materials in the feed.

How has the crisis changed consumers spending? For basic needs such as food consumers are switching to less expensive meat like chicken and within the chicken category to less expensive cuts such as drumsticks, thighs, and wings instead of breast meat. One consumer trend is continuing to expand: consumers want more ready to cook or prepared products[4].

avec values a dialogue with consumers and consumer organisations and has for the 2009 General Assembly the theme "Poultry meat the future, consumers, energy, environment".

Competition for food and feed: energy

avec believes that feeding people is more important than fuelling cars. In 2008 the surge in the bio-fuel industry hardened competition for commodities and prices went up. The devaluation of the dollar and the financial recession decreased the global demand for commodities and eased temporarily the pressure on feed prices. The world population however, continues to grow as will the demand for food, feed and energy. For this reason **avec** follows closely the availability of feed ingredients and their prices.

Soymeal is an important part of a poultry diet. Most soy is imported from the US, Argentina, and especially Brazil. GM soy production is expected to reach 80% in these countries in 2009. The European zero tolerance for non-EU approved GM varieties is already causing whole shipments of soy to be rejected at the EU border and will increasingly be difficult to manage. **avec** continues with FEFAC and other stakeholders to put pressure on the Commission to set a reasonable threshold for the unavoidable presence of GMs in imported feed and for speeding up the GM approval process of the Commission and EFSA.

FOCUS References:

1) IMPRO study by the JRC, April 2008

2) DEFRA/Cranfield: Williams, A.G., Audsley, E. and Sandars, D.L. (2006)

3) DG AGRI prospects, March 2009

4) Euromonitor International: www.euromonitor.com

Community Action Plan on the Protection and Welfare of Animals 2006-2010

The Commission's Animal Health Strategy is closely linked to the Community Action Plan on the Protection and Welfare of Animals 2006-2010.

In October 2008 the DG SANCO sponsored a conference on animal welfare at slaughter and killing for disease control in Sweden and in January 2009 DG SANCO organised a conference on Global Trade and Farm Animal Welfare. Commissioner Vassiliou promoted a win-win situation in terms of improved animal welfare, increased farmer revenue and consumer preferences backed up by participating animal welfare organisations. In the framework of the European Animal Welfare Quality programme a final stakeholder conference will be organized in Sweden in October 2009. The project is about integration of animal welfare in the food quality chain: from public concern to improved welfare and transparent quality. The aim is to accommodate societal concerns and market demands, to develop reliable on-farm monitoring systems, product information systems and practical species-specific strategies to improve animal welfare. The conference will focus on the outcome of the Animal Welfare Quality project which is expected to give tools for future public and private criteria and standards.

avec keeps stressing that equivalence in production and trade is essential and agrees that the next steps of the Commission is to promote the EU standards to OIE/WTO level.

At the same time DG SANCO established a farmland website with the aim of educating children in the EU in issues of farm animal welfare. The farmland website is also available from DG AGRI's website. **avec** has stated its opinion to DG SANCO and AGRI that the poultry entry on the website is misleading and highly biased against conventional poultry farming and should be represented in a more objective and accurate way.

Protection of animals at the time of slaughter, revision of Directive 93/119/EC

Proposal for a Council Regulation 2008/553.

avec participated in 2007 and 2008 in assessments of the impact on the industry with a possible change of stunning methods used for poultry. **avec** has closely followed the subsequent debate of the European Parliament and Council and, in several papers, stated its opinion on e.g. shackling time, electrical stunning currents, electrical frequencies, and electrical stimulation.

avec is disappointed that several issues remain for the industry in the Regulation finally adopted on June 22, and **avec** will be seeking further changes before the new provisions come into force in 2013. A number of recent scientific reports have been published on the stunning of animals including both gas and electrical processes.

avec is persuaded that consumers who want animal welfare to be respected will also expect rules to be based on reliable scientific evidence and will support research that seeks to overcome specific concerns with either process.

Minimum rules for protection of chickens kept for meat production, Directive 2007/43

The Directive enters into force June 30, 2010. The Directive lays down rules for maximum stocking density, drinking facilities, litter, feeding, ventilation, heating, light, noise, cleanliness and surgical interventions, record keeping, and training of stockmen.

avec has lobbied for effective and practical conditions for the industry and has set up a working group with the aim to ensure the Directive is implemented and interpreted in a harmonised way across Member States. **avec** is still working on the critical parameters for monitoring farm welfare at the slaughterhouse and also Member State authorities are working on the indicators to be used.

The Directive requires the Commission to undertake two further studies and produce recommendations relating to breeding and to welfare labeling. The latter is being taken forward under the Commission's wider animal welfare quality activities.

On breeding, the European Food Safety Authority (EFSA) has been requested by the Commission to deliver two opinions by June 2010:

i) Influence of the genetic parameters on the welfare and the resistance to stress of commercial broilers;
ii) The welfare aspects of the management and housing of grand parent and parent stocks raised and kept for breeding purposes.

EFSA has published a call for data from stakeholders. **avec** is closely cooperating with the breeders organized in the European Poultry Breeders group (EPB) to provide EFSA with the needed information. The EFSA opinions will be the input for the Commission's report on the influence of genetic parameters that may affect chicken welfare. In addition the Commission and EFSA are working on a mandate for an opinion on 'genetic influences on resistance to animal diseases'.

Protection of animals during transport, Regulation (EC) 1/2005

The Regulation came into force in January 2007. It replaces the existing Directive but does not yet cover poultry in detail. Revised rules for poultry are due shortly. **avec** has stated its position on Regulation 1/2005 on the transport of poultry, stressing conditions for transport of turkey and chickens differ from other animals. **avec** has advised the Commission on space, feed and water availability, maximum travel times, loading and unloading, training of drivers and costs in connection with transport for day old chicks, chicken and turkey, and has advocated that harmonised standards apply in all Members States.

The draft proposal is still within the Commission services. **avec** has been informed that changes for poultry cannot be ruled out and **avec** will follow the dossier closely.

Labeling of animal welfare

The Commission may intend to have a reference to the animal rearing system indicated on food labels for consumers and reported on this to the Parliament and Council in summer 2009.

At present many different schemes and possibilities exist within the different Member States. **avec** agrees that it is important that the information given to the consumer is transparent, reliable and not confusing. **avec** believes that today consumers are more interested in knowing the farming system but promotes comprehensive labeling since the operators involved in rearing, transport and slaughter have to ensure that expected standards and levels of good welfare are respected. **avec** is following the progress of the dossier.

Avian Flu and Newcastle disease from 2008 to 2009

The European surveillance and notification system continues to limit the effects of outbreaks of AI and ND. In 2009 so far HPAI H5N1 has only been detected in a mallard in Germany. The Czech Republic, France and Italy had outbreaks of LPAI H5 or H7 in geese, ducks, mallards and turkey. There have been a small number of Newcastle disease outbreaks in wild pigeons in Belgium and The Netherlands, and in poultry in Bulgaria.

Compartmentalisation

avec is working with the European Poultry Breeders group (EPB) on compartmentalisation measures. Compartmentalisation is based on animal populations with the same health status under one bio-security plan, and depends on high standards of bio-security, risk assessment and partnership between industry and veterinary authorities. It is based on international standards including an OIE Code and specific guidelines.

In 2009 EPB has worked intensively with the Commission to have strict measures included in the EU proposal. The aim is for trade to resume as soon as possible after an outbreak of a notifiable exotic disease. However, the additional bio-security measures in the Commission

Regulation will only be voluntary and will only regulate conditions of intra state trade and not trade with third countries. The Commission Regulation which will enable operators to establish compartments, will come into force on 1st October 2009 and concerns only compartmentalisation for AI. Compartmentalisation is being discussed globally with the US, Canada, Australia and NZ with whom the EU has agreements on veterinary equivalence. In addition to regionalisation, compartmentalisation put individual exporters in Member States in a better position to meet the veterinary safeguards demanded by importing third countries in the event of an outbreak. **avec** welcomes this initiative and stresses the need for global acceptance of the guidelines.

Animal cloning

ESFA published in July 2008 a very cautious scientific opinion on cloning. The Commission held consultations with EU consumers and stakeholders and in June 2009 the Council of Ministers decided to include food produced from animals obtained by cloning techniques and from offspring of cloned animals in a draft regulation for novel foods.

A European Parliament opinion recommended in September 2008 to ban food from cloned animals and from placing meat derived from cloned animals and their offspring on the market (including imports). For this reason the discussion is expected to continue.

Animal Health Law

In the framework of the animal health strategy the Commission is considering many issues. **avec** is working with the Commission on many of them. The Commission is preparing a new European Animal Health law with the goal to create a clearer and simpler regulatory framework. For poultry health, the affected legislation is Directive 90/425 on intra-Community trade in certain live animals and products, Directive 90/539 on trade of poultry and hatching eggs, the disease control Directives 92/66 (NCD) and 2005/94 (AI) and Regulation 2160/2003 on zoonosis.

The Commission held an open consultation for stakeholder input for improvements of animal health laws in April 2009.

avec has participated in other related activities in the framework of the future animal health strategy: in 2008 in the planning and implementation of the EU "Veterinary Week" and will participate again in September 2009 in a follow-up Conference "One Health". Other important issues are prioritization of animal diseases, emergency preparedness (implementation of contingency plans) and inspection fees.

From September to December 2009 the Commission will hold a public consultation on the animal health law. Then cost studies will be carried out and in December 2010 the Commission is expected to present a proposal for a new animal health law and an impact assessment.

FOOD AND FEED SAFETY

The European poultry industry complies with strict measures to ensure safe poultry meat to consumers. Food producer responsibility, food hygiene measures, microbiological testing, labeling of food, marketing standards and training of staff are regulated and criteria for these activities are currently being updated and revised.

avec is in favour of EU regulations aimed at guaranteeing safe, wholesome food and **avec** expects that the Commission applies equivalent rules for countries exporting food to the EU.

Regulation 2160/2003 on the reduction of Salmonella in poultry meat
The Regulation requires 'absence of Salmonella in 25 g poultry meat' from December 2010. For **avec** this requirement:

- will undermine consumer confidence for poultry meat
- lacks consistency between the regulations on zoonoses (2160/2003) and on microbiological criteria (2073/2005)
- is discriminating against poultry meat compared to other foods intended to be cooked before consumption.

avec has carried out a socio-economic impact assessment that has been sent to DG SANCO together with a joint **avec**, EUROCOMMERCE and Copa-Cogeca letter to Director General Robert Madelin on the criteria and the implications of its enforcement. Mr Madelin has requested further impact assessments and **avec** is currently participating in this work. For **avec** it is crucial that the criteria are based on measures which directly contribute to the improvement at farm and slaughterhouse level and which will not harm the image of poultry meat and affect negatively poultrymeat complying with this standard. Today many EU Member States have been able to substantially reduce Salmonella prevalence by improving the bio-security measures and the breeder flock status.

Together with other stakeholders, **avec** will participate in the upcoming meetings with the Commission and will continue to press for a reasonable and practical approach to the setting of the implementing measures. Misunderstandings exist within the Commission since some officials appear to believe that antimicrobial treatment might be a tool for complying but the effect of such treatment will have only a pathogen reducing and not eliminating effect.

Antimicrobial treatment (AMT)
In December 2008 **avec** noted with pleasure that the Council of the Agricultural Ministers almost unanimously rejected the US chlorine treatment of poultry meat. **avec** had been lobbying for this and thinks that with the present strict hygienic measures that apply at European farm level (disease control programmes as foreseen in the zoonoses Regulation 2160/2003) - there is no need now to introduce the use of other substances than potable water for decontamination of poultry carcasses.

The US has threatened to challenge the EU decision in the WTO. It remains to be seen what happens when the WTO/DOHA negotiations are taken up again and during the next discussion in the TEC (transatlantic economic council, EU-US summit). A new WTO ministerial is expected in fall 2009.

Revision of the hygiene package – regulations 852/2004 – 853/2004 – 854/2004 and of 178/2002 regarding article 18 on the traceability of food of animal origin.
The "Hygiene" Regulations lay down rules for the food chain "from stable to table" that is "food safety throughout the food chain starting with the primary production." The Regulations deal with issues of common hygiene requirements, the registration or approval of food establishments and the possibility of developing guides to good practice at all levels of the food chain and the official controls.

The evaluation of the hygiene package is still ongoing and **avec** has expressed its position to DG SANCO on the responsibility of the industry in respect of unpacked loose products and on added water in connection with fresh and prepared products saying that consumers must have access to the same information whether the products are sold packed or loose. **avec** has also stated its opinion advocating a European label of origin. On fresh poultry meat and poultry meat preparations, **avec** is firmly against frozen meat being allowed to be thawed and marketed as fresh. **avec** has actively participated in the reformulation of the new raw meat material that was previously called MSM. This new meat that should be included in the meat content is currently going through a process of standardization at AFNOR the French standardisation agency.

Community Guide on Good Hygiene Practice for chickens

avec has in co-operation with COPA-COGECA drafted a Community Guide on good practice for meat chickens covering recommended hygiene measures from the farm to the slaughterhouse. The guide deals especially with measures and interventions to prevent infection and spread of zoonoses such as Salmonella. The guide was forwarded to DG SANCO in November 2008. **avec** is awaiting SANCO's analysis of the slaughterhouse part of the text and hopes that the guide can soon be finalised and that it will be a useful tool in the European Union for poultry farmers and slaughterhouse operators.

Animal by-products legislation, Regulation 1774/2002

The revision of Regulation 1774/2002 on animal by-products is coming to a final stage. A draft amendment on the current legislation was published by DG SANCO in 2007 (829/2007). Today 60-70% of the carcases rejected at the slaughter line are placed in category 2 by official veterinarians. **avec** has advocated that once an animal has undergone the ante mortem inspection successfully and is fit for slaughter the rejections at the slaughter line should be classified into category 3. When the rejected parts are managed in accordance with the Regulation they present no risk to animal or public health.

In the context of the Regulation **avec** and other stakeholders have advocated the partial lifting of the ban on the use of animal protein in feed. It seems however, that the political pressure and consumer fear have influenced the debate of the European Parliament and the Standing Committee. Completely reliable tests able to separate the products by species are essential, but are still not available.

The Agricultural Council has agreed with the EP about the text of the revision and it is expected a new draft will be available during the Swedish presidency. After adoption by the Council, a transitional period of 15 months will start during which the Commission will present further implementing measures. In October 2009 stakeholders will be invited to a meeting on the latest developments.

GMs in feed: EU feed and food security at stake

avec, along with other stakeholders, keep the Commission informed about the serious and growing difficulties caused by the EU zero tolerance of adventitious presence of non-EU approved GM varieties in imports of feed ingredients. Some 75% of soy used in the EU is imported from the US, Brazil and Argentina, large producers of GM soy.

The problem comes from the process of approval of new GM varieties in Third Countries being considerably quicker than in the EU. The Commission and EFSA assessing the new GM crop varieties and imports have promised to speed up the approval procedures. The discussion on fixing a threshold of tolerance for non-EU approved varieties continues between stakeholders, DG AGRI, DG Environment and Standing Committee experts. So far no workable compromise has been reached.

In the beginning of June RASFF reported that traces of the unauthorized genetically modified maize MON88017 was found in extracted soy bean meal from Germany (ref.2009.0716) and the entire cargo was withdrawn. This worrying rejection of the import cargo spurred stakeholders to send a common letter to Commission President Barroso and Commissioners Vassiliou, Ashton and Fischer Boel to explain that this latest incident clearly demonstrates two points:

1. The European Union must take a pragmatic approach towards green biotechnology and urgently adopt the "technical solution" for GMOs, which was clearly expressed by the College of Commissioners one year ago but is not yet authorized in Europe,

2. Both the food and the feed supply are equally vulnerable to "contamination": any discrimination between feed and food with regards to the scope of the technical solution would be arbitrary and runs counter to the entire approach of the European legal framework. This framework has harmoniously managed both food and feed issues over the last decade and discrimination between a food or feed end use is not possible within the reality of today's bulk agro-food trade and supply chain.

MARKETING STANDARDS – LABELING OF POULTRY MEAT

Marketing Standards

Proposal for a Council Regulation amending Regulation (EC) 1234/2007 on marketing standards for poultry meat is in the final phase. **avec** has actively promoted the definition "fresh". The interpretation of "fresh" in the Hygiene legislation and the Marketing standards is different as the first allows for previously frozen meat to be thawed out and sold as fresh.

avec has urged that the consumer perception and expectation of "fresh" should be respected in the marketing regulation: that is that poultry meat sold as fresh, must be fresh and cannot have been frozen previously. Furthermore **avec** has lobbied for an extension of the definition of fresh to apply also to poultry meat preparations. This is important as consumers buy more and more prepared poultry meat.

avec is pleased to see that its recommendations have been taken into account in the final proposal which is expected to be passed by the Council in September. Brazil and China have reacted on the EU notification to the WTO of the changes.

Mandatory labeling of food information to consumers

In January 2008 the Commission adopted a proposal for a revision of existing legislation on food and nutrition labeling. The proposal COM (2008) 40 final concerns labeling of prepared products.

avec convened in 2008 a working group that has discussed the proposal and agreed to a position. The proposal has been discussed from October 2008 to April 2009 in the Committee on the Environment, Public Health and Food Safety of the Parliament and following many amendments, the rapporteur has asked for a new report by the Parliament. It will be discussed in September. At stake are issues like which nutrients should be mandatory to label, compulsory or mandatory labeling of origin, portion size, information on non-prepackaged food and date of production. Likewise "fresh" and MSM and the new category of meat obtained by Baader or other techniques have been discussed.

avec will continue to follow the next developments closely.

Green Paper: Agricultural Product Quality

DG AGRI opened in October 2008 a public consultation and working group meetings on the quality of agricultural production with the intention to help European farmers promote high quality agricultural production. A communication was issued on the results of the work in May 2009.

avec responded to this and organised working group meetings. **avec** cannot support an ECO-label for food as this will confuse consumers. Labeling of origin is the best way to communicate the standards the product is complying with. The proposed label of 'EU farming' or 'Non EU Farming' might make compliance with EU standards more visible to consumers. **avec** is defending the marketing standards for poultrymeat. Furthermore there is a need to make a clear difference between sustainable and environmental friendly. Finally **avec** is intending to draft striking messages to position sustainable poultry meat in the mind of consumers in the EU.

More information and references on FOCUS issues:

http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52008DC0397:EN:NOT
http://ec.europa.eu/food/animal/welfare/slaughter/slaughter_roadmap_en.htm
http://ec.europa.eu/food/animal/diseases/strategy/docs/animal_health_strategy_en.pdf
http://ec.europa.eu/food/animal/diseases/adns/index_en.htm
http://ec.europa.eu/food/food/biosafety/salmonella/impl_reg_en.htm
http://ec.europa.eu/food/food/biosafety/salmonella/legisl_en.htm
http://ec.europa.eu/prelex/detail_dossier_real.cfm?CL=en&DosId=196686
Proposal COM (2008) 345 final amending 1774/2002 on animal by-products
http://ec.europa.eu/prelex/detail_dossier_real.cfm?CL=en&DosId=197093
Proposal COM (2008) 336 marketing standards for poultry meat
http://ec.europa.eu/prelex/detail_dossier_real.cfm?CL=en&DosId=197076
http://ec.europa.eu/agriculture/quality/policy/communication_en.htm
http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/agricult/108682.pdf
http://www.efsa.europa.eu/EFSA/efsa_locale-1178620753812_1211902269834.htm

European turkey market situation

The European turkey producers are in a delicate situation. On the one side they are faced with internal market competition with other species in particular pork and on the other side with imports from third countries for the processing industries. In general the production is stable in the EU but in some Member States the production is largely expanded and may even exceed the demand. This results in a larger offer aggravated by a demand falling due to higher cost prices and firm competition with pork meat.

Some late adjustments at the end of 2008 improved the market conditions in spring 2009. The financial crisis has severely impacted the Western economies effecting the meat consumption. In terms of the price of turkey meat the consumption of turkey meat will remain stable but most likely more and more favorable for meats sold at lower prices. The competition will furthermore be strong from other meat sectors also under pressure with stocks unsold.

The equilibrium of the market situation really depends on the management of the imports. The import statistics prove that the poultry sector has difficulties in managing the imports. For this reason the European authorities should take the standpoint that all imports must apply to the same sanitary conditions as those imposed on the European producers. Many of these conditions concern the farm stage and are difficult to control in the final products.

Reduction of the Salmonella prevalence in turkeys

The aim of the Regulation (EC) 584/2008 is to reduce the prevalence in the EU of *Salmonella enteritidis* and *Salmonella typhimurium* in turkeys. The prevalence of these two serotypes must be inferior or equal to 1% from 31st December 2012 in turkey flocks for fattening.

These measures are closely related to the measures that will apply for fresh turkey meat from the 12 December 2010 in accordance with Regulation 2160/2003 on the control of Salmonella. Fresh meat of poultry including turkey can no longer be placed on the market for human consumption if they do not respect the criteria "Salmonella: absence in 25 g".

The European poultry professionals must carefully monitor the feasibility of EFSA's criteria based on a survey on the prevalence of Salmonella in turkey flocks 2006/2007. It will be difficult and not realistic to keep such a strict target for the sale of meat before the progress achieved in the transitional period until December 2012 has been evaluated.

Turkey Welfare

The working group working with the welfare of turkey finalised its scheduled project on June 18 2008 in Berlin. The objective of the project is to improve the performance of the European turkey producers by establishing a link between the appearance of pododermatitis and the rearing conditions. A detailed classification on the lesions is needed before possible risk factors can be identified and the corrective measures can be suggested. The work is mainly based on techniques to improve the quality of the litter used during the bird's lifetime.

A multi approach has been developed with the establishment of an experimental "house" with different soil conditions. Seven research institutes are involved in the project started by the professional organisations of five Members States and **avec**.

If the financial budget is accepted the work will expand over 36 months from 2010. 70% of the financing is applied for from the EU Commission and 30% will be paid by the industry.

Participating organisations:

Wageningen UR, Animal Sciences Group - Association of Poultry Processors and Poultry Trade in the EU countries - British Poultry Council, Turkey Sector Group, - German Turkey Growers Association - Comité Interprofessionnel de la Dinde Française- Krajowa Rada Drobiarstwa-Izba Gospodarcza - Avitalia - Aviagen Turkeys - Schothorst Feed Research - Roslin Institute - University of Oxford - University of Warmia and Mazury - French Agency for Food Safety - Istituto Zooprofilattico Sperimentale della Lombardia e dell 'Emilia Romagna' - Institut für Tierernaehrung - Otte GbR - P.H.P. Fermpol Sp. z.o.o..

TRADE NEGOTIATIONS 2008-2009

The European poultry industry complies with strict measures to ensure consumer health, animal welfare and concern for the environment. These very high and costly standards may be regarded as barriers to trade and are often discussed with DG Trade, OIE, WTO and Codex.

WTO - DOHA tough negotiations - a new beginning?
The Doha Development Round negotiations picked up in Geneva in July 2008 but results were highly uncertain and the talks broke finally down in December 2008. However, based on the latest papers circulated in December 2008 by Ambassador Falconer talks are expected to resume on the technical issues under the new chair Ambassador Walker in September 2009.

In June a delegation headed by the President, Secretary General, Director, the Vice-Presidents of **avec** and industry leaders from the Netherlands, United Kingdom, Italy, Spain and Germany met Director General, Jean-Luc Demarty, of DG AGRI to discuss the possible options in the coming negotiations.

avec repeated its opinion to DG AGRI and stressed that the Commission's calculations on which the TRQs for sensitive poultry products are based were miscalculated summing up to a domestic European consumption of breast meat of 4,5 million t and of leg meat of almost 300.000 t. **avec** still welcomes the Commission aims at poultry being sensitive and at having 2 TRQs with different tariff lines. However **avec** is very reluctant to accept a zero duty for the so called in quota tariff rate since the TRQs hold a large volume (about 300.000 t after implementation) which will come in addition to the existing TRQs (almost 700.000 t). Moreover, all imports concern boneless breast meat and for the production of 100.000 t boneless chicken meat 500.000 t chicken must be slaughtered.

REGIONAL TRADE REGIONS AND TRADE NEGOTIATIONS

avec believes that the critical limit of the maximum volumes of TRQs for poultrymeat will be reached when the DDA TRQs for poultrymeat to be granted as a compensation for being sensitive product will be added to the existing TRQs. There is no room at all for additional poultrymeat TRQs in bilateral or regional trade agreements without putting at risk the future competitiveness of the European poultry industry.

The Commission has opted for a region to region approach in some of the free trade discussions. So far, this approach has not been very successful in the ASEAN (Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam) region. This also applies for the ANDEAN COMMUNITY (Bolivia, Peru, Colombia, Ecuador and Paraguay). More bilateral talks may be a solution though negotiations continue.

CENTRAL AMERICAN COMMUNITY
(Costa Rica, Guatemala, Honduras, Nicaragua)
The region to region approach seems to work in the trade negotiations and results are expected, especially for exports of goods to the region. Talks on IPR and anti-dumping are also moving. However, issues like market access, free circulation of goods, geographical indications, sustainable development, services and investment and public procurement are still outstanding.
Panama may join the region in 2009.

KOREA
Korea is currently EU's 8th biggest trading partner outside the EU and the EU is Korea's second largest export market. The Korea - EU free trade negotiations are reaching a final stage. The average Korean tariffs on especially agricultural products are high (35%). For industrial products the tariffs will move to zero. Free trade agreements are expected to be concluded in 2009.

Korea imported in 2008 14.812 t frozen poultry meat, cuts and preparations. EU exported 2.592 t of frozen cuts the remaining import comes mainly from Brazil and the US.

INDIA

India is a fast growing economy (8% annually) with a large population. India's market is opening up but still has substantial tariff and non tariff barriers to trade. Of interest to **avec** is the SPS standards where the EU standards are higher than India's and India's SPS are not always scientifically based. Negotiations slowed down in the spring 2009 because of the elections in India. Tariff offers have been exchanged during an EU/India meeting in March but no deals have been reached and negotiations are expected to start again when the new government is in place.

UKRAINE

The national political and economic situation in Ukraine is complex. The EU approach and neighborhood policy is to make Ukraine adopt EU laws. However, the financial crisis has hit Ukraine hard and currently a 13% surcharge on all imported products has been imposed. This surcharge was found unconstitutional in June 2009 and will be removed. Ukraine's exports to the EU were liberalized thanks to a General Systems of Preferences granted in 1993. Ukraine acceded WTO in 2008.

In 2008 Ukraine imported 75.301 t of frozen cuts and 7.392 t of frozen chickens from the EU and from Brazil 4.613 t frozen cuts. From the US Ukraine imported 3.467 t of whole frozen chicken and 157.243 t frozen cuts. In 2008 EU-exporters supplied Ukraine with almost 60 million day-old chicks and more than 70 million hatching eggs.

CHINA

Today, China is the world's 3rd largest economy and Europe's second largest trading partner after the US. China's exports to the EU represent a value of 248 billions Euros, EU's to China only 78 billions. China imposes many excessive regulatory requirements on goods falling outside China's WTO commitments and has problems with the IPR. China would like to export more agricultural products to Europe, and SPS issues like the export of cooked poultry meat to the EU are discussed. A number of meetings and high level summits on trade relations are scheduled for autumn 2009.

In 2008 China imported 10.396 t of frozen poultry cuts from the EU, 572.038 t of frozen cuts from the US and 192.252 t frozen cuts from Argentina. China's export to the EU of cooked products resumed in December 2008 after a 6 year ban due to lack of Chinese pesticide residue management. However, cooked products can only be exported to the EU from the Shandong province.

RUSSIA

In 2008 the Russian Ministry of Agriculture delisted several EU poultry plants for not complying with the Russian sanitary requirements including residue limits going beyond EU accepted levels.

A memorandum on technical issues had been agreed between the EU and Russia in 2008.
As a follow up the Russian inspection services have in spring 2009 inspected European poultry meat exporters for approval in Belgium, Germany, France, Spain, the Netherlands and Poland.

avec is concerned that the transparency of the check lists according to which the European establishments are benchmarked is lacking. The European Commission is in contact with the Russian authorities to question the issue. **avec** will follow closely any developments.

Russia is currently promoting selfsufficiency in poultry production, but in 2008 Russia imported 821.003 t of frozen cuts from the US, 120.614 t of frozen cuts from Brazil and approximately 144.000 t of broiler meat from the EU. Russia has however decreased its import quota for EU total poultry for 2009 to 185.800 t. The EU may try to benefit from the new strict pathogen reducing treatment (PRT) rules to be implemented in Russia in 2009.

Russia applied for WTO membership (in 1993!) but recent political developments have put a hold to Russia's application.

THAILAND

After bird flu outbreaks in Thailand in 2004 the EU imports of salted chicken products ceased and only cooked products have been exported. A February 2009 FVO mission report on Thailand states among many issues that not all poultry plants use sufficient heat treatment. Nevertheless, Thailand has recently had talks with DG Trade to have export quotas for salted meat reinstated from 2010.

In 2008, Thailand exported 138.303 t of cooked poultry meat to the EU.

USA

On September 30, 2008 the US introduced - COOL - mandatory country of origin labeling for a number of food items including poultry meat. This means that eg US origin is solely poultry born, raised and slaughtered in the US. Canada has threatened to take the US to WTO on the COOL. Likewise, the US has threatened to take the EU to WTO on the December 2008 Council decision to ban the use of chlorine treatment on poultry carcasses. This ban continues the 1997 ban on the use of antimicrobial treatments for poultry meat (Directive 97/94/EC).

Main importers of US frozen and poultry cuts are the EU, Russia, Ukraine, Cuba, Mexico, China and Hong Kong.

BRAZIL

Brazil used its 2007/2008 tariff quota for broiler meat. Exports, however, declined after July 2008. There is reason to believe that exports will pick up again, especially after the recent merger between Perdigao and Sadia controlling now approx. 25% of the global market.

In 2008 Brazil exported 627.386 t poultry meat of which 11.781 t whole frozen, 153.782 t chicken cuts frozen, 81.073 t chicken preparations, 270.366 t salted poultrymeat and 65.984 prepared/preserved turkey meat to the EU.

CHILE

Chile has recently started import and export of poultry meat and doubled in 2008 exports of frozen breast and salted cuts to the EU. In 2008 the EU imported from Chile 14.221 t of frozen cuts, 10.761 t salted poultrymeat and 9.558 t turkeymeat.

More information:

http://www.agra-net.com
http://www.fas.usda.gov/gainfiles/200903/146327402.doc
http://www.fas.usda.gov/gainfiles/200508/146130686.pdf
http://www.efsa.europa.eu/EFSA/efsa_locale-1178620753812_1211902034881.htm

PROSPECTS FOR POULTRY MARKETS IN THE EU AND GLOBALLY: 2009 – 2018

The outlook for agricultural commodities of DG AGRI in the EU-27 over the 2009-2018 period has been worked out on the basis of specific assumptions on agricultural and trade policies and the macro-economic environment. The joint OECD-FAO 2009-2018 outlook is based on OECD's outlook database including historical data projections. Data should in light of the rapid developments of the ongoing financial and economic crisis be interpreted with caution.

Data from FAPRI are based on net trade and not like OECD/FAO/EU on a separate consideration of exports and imports. Contrary to OECD/FAO/EU data FAPRI data concern only broiler meat.

EU and global economy

The economic growth in the EU is estimated to fall from 1,0% in 2008 to -1,8% in 2009, with a modest recovery of 0,5% in 2010. At global level, world GDP is projected to decline by 0,5% in 2009 but to rebound by 2,6% in 2010.

Outlook for feed and poultry

Despite the huge impact of the global economic prospects the agricultural sector will be better off than other sectors because of the relatively income-inelastic demand. Food security is high on the political agenda and the discussion is about the capacity of the agrifood-sector to meet the rising global food demand. According to FAO an increase in the global food production of 40% by 2030 and by 70% by 2050 is necessary to meet the longer term population and income projections.

Feed production, demand and prices

For oilseeds over the period 2009-2018 Brazil's share of global exports is expected to grow 30 - 39% and Brazil will be the leading exporter. Argentina will promote domestic crushing which will make larger shipments of oilmeals possible in the coming years.

China is expected to surpass the EU as the leading oilmeal consumer. Large growth is also expected in Brazil, the CIS (Commonwealth of Independent States) and India.

After the hike of feed prices until July 2008, a larger harvest, and fall in oil prices and demand for bio-ethanol the commodity prices are much lower in 2009 and are expected to remain lower over the coming 2-3 years. Longer term prospects however foresee that prices will be at/or above the 2007-2008 peaks and average crop prices are expected to be 10-20% higher in real terms relative to 1997-2006.

EU - global meat consumption, production and prices - short, medium and long term

For poultry, the short production cycle and growing consumer preferences for poultry meat enabled the EU sector to increase prices in line with feed prices, dampening the effect of higher input costs.

Medium terms prospects remain positive with an increased consumption of poultry and pigmeat while the consumption of the other meats will decline further. The growth in demand for poultry meat is expected to outpace the production expected to expand by 2,1 % over the medium term projection period (2008-2015).

Competitive prices to other meats and strong consumer preference are projected to drive the EU poultry production to 12,5 million t by 2015 (+8,8%). Poultry consumption is projected to increase at the higher rate of 9,4% by 2015.

Globally the projected consumption and production would increase from 98 million t in 2009 to 120 million t in 2017 especially in the developing countries where growing incomes increase the demand for meat (82% of the projected global growth) according to FAO.

Short term EU meat prices are not expected to surpass the 1997-2006 average. Reduced consumer incomes in the first part of the period will increase demand for cheaper meats favoring poultry over beef although pig meat remains the most preferred meat by EU consumers maintaining its current share of 50% in per capita consumption, followed by poultry that would increase its share to 28% (+1,5 p.p.) at the expense of beef and sheep meat.

OECD/FAO price projections foresee a modest broiler price recovery after a decline in 2010 and 2011. Long term projections (2018) expect broiler prices to increase to 23% from the 1999-2006 average.

EU and global imports - exports

From 1999-2007 trends

From 1999 to 2007 the world trade in poultry meat grew substantially: Global exports increased from 6,3 million t in 1999 to 9,3 million t in 2007. Brazil's annual growth rate in exports in that period was 19,5% per year and Brazil has largely taken over the US position as the world's largest exporter.

On the imports from 1999 to 2007 the strongest imports were noted in the EU and in Mexico (+ 10%). Russia and Japan's import rates will shrink at a rate of 1,5% per year for the period 2009-2017 but other main players will increase their imports.

Prospects from 2009-2018

For the EU the positive meat export situation in 2008 is expected to end in 2009 due to the global recession and changed import policies of especially Russia. EU exports are projected to decline slowly but steadily over the medium term. Imports would grow moderately over the medium term returning the EU to its net importer status from 2007. The **EU will not benefit from the long term positive prospects and the rising demand in new markets**.

Globally investments especially in emerging economies like that of India, China, Russia and Ukraine will lower their imports dependency of meat products and increase their exports. However, also Brazil's export growth rate is expected to slowdown to a + 5,8% per year.

Although global poultry trade is expected to slow down slightly in 2009 it is expected to resume in 2010 and the volume traded in 2011 is expected to be higher than that of 2008.

Projected shares in world trade exporters and importers (broilers only):

Shares in World Trade **net exporters**	Share in % 1999 - 2007	Share in % 2009 - 2018
US	47	41
Brazil	39	50
Thailand	7	6
Argentina	1	2
Other	6	1

Shares in World Trade **net importers**	Share in % 1999 - 2007	Share in % 2009 - 2018
Russia	23	15
Japan	14	9
Saudi Arabia	8	7
Mexico	6	7
China - Hong Kong	4	3
Ukraine	2	2
Other CIS	3	3
South Africa	3	3
China - mainland	1	5
Taiwan	1	2
South Korea	1	2
EU	- 6	1
Philippines	0	1
Other	40	40

Source: FAPRI 2009-2015

Source :
DG AGRI, Prospects for Agricultural Markets and Income 2008-2015, April 2009
DG AGRI, Prospects for Agricultural Markets, 2009- 2018, July 2009:
http://ec.europa.eu/agriculture/analysis/tradepol/worldmarkets/outlook/2009_2018_en.pdf
OECD-FAO, Agricultural Outlook, 2009-2018 - www.agri-outlook.org
http://www.oecd.org/pages/0,3417,en_36774715_36775671_1_1_1_1_1,00.html

GLOBAL VIEW ON WORLD MARKETS BY COUNTRY/ REGION 2009

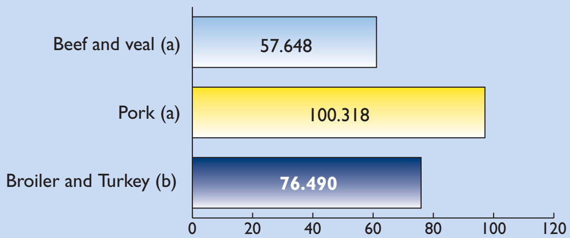
From: USDA Livestock and Poultry World Markets and Trade reports, April 2009 and DG AGRI's Outlook July 2009.
Note: USDA data only include the market's major players.

Recent developments in the poultry sector

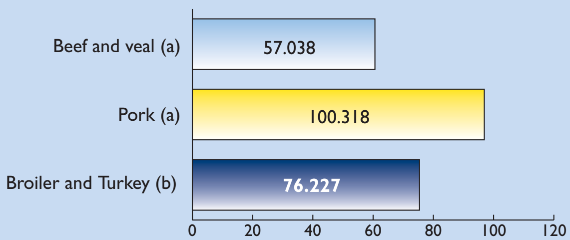
Poultry meat has gained importance and the sector has been the most dynamic in the last decade as the total poultry consumption and production increased from 66 million t in 1999 to approximately 75 million t in 2007 (USDA FAS). The growth of the sector has taken place despite the avian influenza crisis. The consumption of poultry meat boomed especially in developing countries but also in the EU and the US.

Brazil has seen the highest growth rate in the production of poultry meat + 8,4% a year whereas the EU, US and China have had more modest growth rates. Poultrymeat production is, however, expected to stagnate in 2009 due to the global economic slowdown. US, Brazil and China account for 55% of the world output. Productions in US and China will decline, in the US due to increased costs, in China due to AI. Production in Brazil, Russia and Ukraine will continue to expand. Consumption will increase in the EU and Brazil but will decline in the US due to the financial situation and in China as consumers' preferences shift to pork.

WORLD PRODUCTION 2009 (forecast)



WORLD CONSUMPTION 2009 (forecast)



Source: USDA-FAS attaché reports, official statistics, and results of office research.
a. 1.000 Metric Tons (Carcass Weight Equivalent) **b.** 1.000 Metric Tons (Ready to Cook Equivalent)

MARKET SITUATION - BROILER MEAT

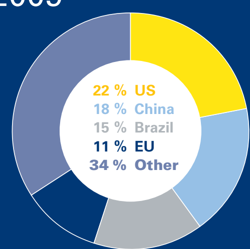
Broiler production expected at 74,2 million t

Despite the financial crisis and stagnation in 2009 the world broiler production is expected to go up 3% compared to 13% the 3 previous years. China's production is expected slightly down with 195.000 t from 2008 and the EU and US production will stagnate in 2009. Productions in Brazil are expected to increase compared to 2008 and will be of 11.400 million t end of 2009. The Russian poultry production keeps expanding from an estimated 1.600 million t in 2008 to 1.780 million t end of 2009 aided by government subsidies and import restrictions.

Slight increase in consumption worldwide

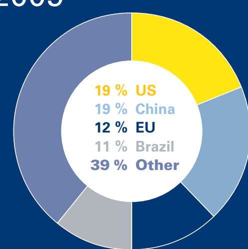
According to USDA FAS the total domestic consumption of broiler meat will reach 73.831 million t in 2009 up from a projected consumption of 70.518 million t in 2008. In all major producing countries consumption is up only the United States will experience a slight drop in its domestic consumption. Longer term perspectives for China estimate consumption of poultry to slow as consumer preferences shift to pork. Per capita consumption of poultry meat in the EU will rise from 23,4 to 23,6 k from 2008 to 2009.

WORLD BROILER PRODUCTION 2009



Share (forecast) in %

WORLD BROILER CONSUMPTION 2009



Share (forecast) in %

Source: USDA-FAS attaché reports, official statistics, and results of office research.

Exports of broiler meat to decline in 2009

EU exports face more and more competition from lower cost countries like Brazil, Thailand, China and the US. Broiler meat exports by major traders are forecast to decline even Brazilian exports will grow slower mainly due to decreased imports by Japan, Russia and Ukraine. US exports are likewise decreasing.

EU-27 exports to fall

Exports are forecast at 610.000 t down from an estimated 740.000 t in 2008 despite the fact that no European producers have been hit by avian influenza and its consequences for exports. Some of the major EU exporters have been hit by the financial crisis and its effects on imports to Russia and Ukraine. New Russian sanitary rules have made re-approval of all companies exporting to Russia necessary and many EU producers can no longer ship to Russia. Ukraine, hit by the financial crisis and currency devaluation, has put a 13% import tax on all imported products.

United States exports also to decline in 2009

US exports are expected to be down in 2009 by an estimated 9% to 2008. This is due to the unstable financial situation, the depreciation of the dollar, tighter domestic supplies and higher feed and energy costs. Due to new Russian legislation on the ban on use of pathogen reducing treatment exports to Russia, the major market for US poultry, are expected to decline. Other export markets like Mexico, Guatemala, China, Turkey and Cuba are to remain strong but Ukraine will slow down imports from the US.

Brazilian exports to slow down in 2009

Exports are only estimated to grow by 3% in 2009 compared to a previous 11% from 2007 to 2008. The recent merger between Sadia and Perdigao will create a company with a 60% share of the Brazilian production. Major export markets for Brazil are the EU, Russia, Angola, Egypt, Venezuela, Iraq, Kuwait, Oman, Saudi Arabia and United Arab Emirates.

Global imports to decrease in 2009

Imports increased globally with more than 30% from 2006-2008 but are expected to decline slightly in 2009. Due to the global financial downturn restrictive policies of some countries have slowed down imports. Mexico and the EU are however expected to increase their imports as consumption increases.

EU to become net importer again in 2009

EU broiler meat imports are forecast to increase slightly in 2009 to 680.000 t. Bird flu outbreak in Thailand in 2008 slowed imports but Thailand pressures to reopen the EU market for raw poultrymeat again from 2010. Imports from China of cooked products to the EU resumed in December 2008 after a 6 year ban due to lack of Chinese pesticide residue management.

Russian imports will also fall

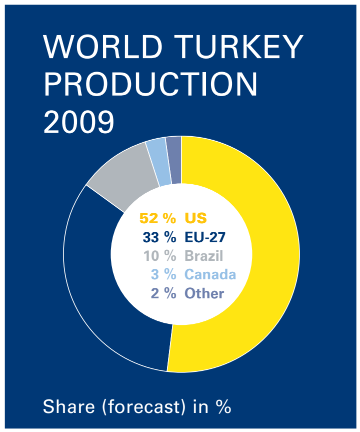
Russia was earlier the largest importer of broiler meat but the Russian government has set up incentives to promote investment in the Russian poultry industries. Russia's production increased from 2007 to 2008 with 11%. The financial crisis and new Russian SPS rules on poultry meat have affected imports to Russia.

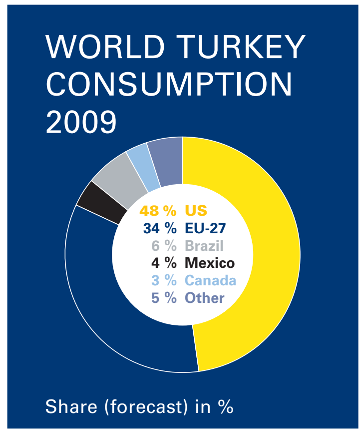
MARKET SITUATION - TURKEY MEAT

Production and consumption patterns globally

The world turkey production is expected to decrease slightly from 5,3 million t in 2008 to an estimated 5,2 million t in 2009. The EU27 production will decrease slightly from 1,8 million t to 1,7 million t in 2009. The US production is also expected to decrease from 2,8 million t in 2008 t to 2,7 million t in 2009. Other producers are expected to increase the production like Russia and Brazil but the production will remain stable in Canada, South Africa and China.

Consumption remains stable at 1,7 million t in EU27 and stable in South Africa, whereas it increases slightly in the US, China, Russia, Canada and Brazil.





Source: USDA

Turkey meat trade forecast to increase in 2009

Turkey meat imports by selected countries are forecast to increase from 493.000 t to 514.000 t in 2009. Turkey imports by Mexico, China and the EU are forecast to increase by an average of 10% in 2009. Turkey exports by Brazil are forecast to increase by 10 % in 2009 and to fall by an average of 10% for the US and the EU27. Market shares among major traders except Brazil will be slightly down to the benefit of Brazilian production and trade.

From USDA Livestock and Poultry World Markets and Trade reports, April 2009: http://www.fas.usda.gov/psdonline/circulars/livestock_poultry.pdf *www.agra-net.com*

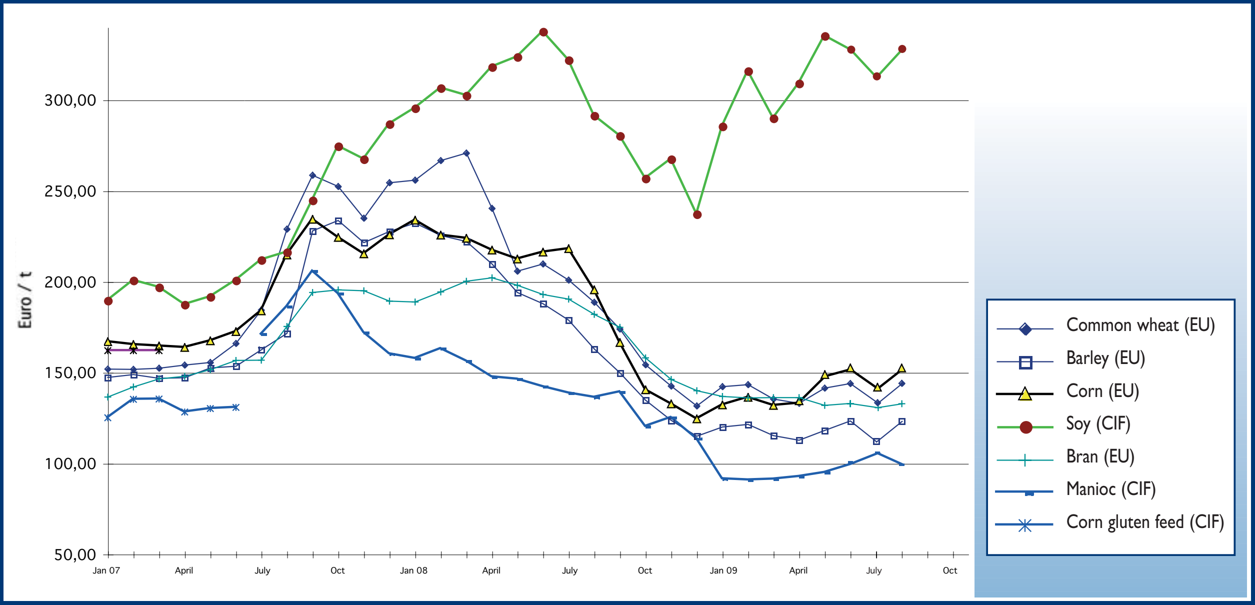
STATISTICS

EU POULTRY MEAT SUPPLY (000' t)

	2003	2004	2005	2006	2007	2008
	EU-15	EU-25			EU-27	
Gross production	8.987	10.921	10.998	10.648	11.385	11.503
Total Exports	1.275	1.300	1.240	1.240	1.050	1.150
Total Imports	1.100	500	640	650	820	840
Consumption	8.700	10.350	10.550	10.250	11.150	11.200
Consumption per capita,k	22,7	22,5	22,9	22,1	23,1	23,1
Rate of self-sufficiency %	103	106	105	105	101	102

From: MEG 2009

PRICE FLUCTUATIONS COMMON WHEAT, BARLEY, CORN, SOY, BRAN, MANIOC, CORN GLUTEN FEED 2007-2009



From: DG AGRI C4, August 2009

PRODUCTION

GROSS INDIGENOUS PRODUCTION OF POULTRY MEAT IN THE EU (000't carcass weight)

	2003	2004	2005	2006	2007	2008
Austria	112	114	114	109	119	119
Belgium/Luxembourg	289	295	282	278	267	263
Denmark	205	213	207	185	187	191
Finland	84	87	87	87	95	102
France	2.015	1.973	1.918	1.793	1.862	1.845
Germany	1.077	1.166	1.197	1.185	1.273	1.341
Greece	169	166	177	169	184	184
Ireland	120	122	127	121	112	103
Italy	1.097	1.128	1.101	984	1.056	1.106
The Netherlands	534	604	618	617	684	697
Portugal	270	290	296	289	318	320
Spain	1.336	1.310	1.302	1.283	1.283	1.306
Sweden [1)]	106	81	82	85	87	88
United Kingdom	1.574	1.574	1.581	1.535	1.460	1.432
EU-15	**8.987**	**9.122**	**9.089**	**8.720**	**8.987**	**9.097**
Cyprus	34	31	33	27	29	29
Czech Republic	212	217	226	213	202	196
Estonia	14	15	14	13	12	12
Hungary	380	384	375	386	376	380
Latvia	12	14	17	21	21	21
Lithuania	39	49	57	66	68	68
Malta	8	6	5	4	5	5
Poland	851	916	1.016	1.037	1.116	1.115
Slovenia	66	67	67	67	66	65
Slovak Republic	98	99	99	95	83	83
EU-25	**10.701**	**10.921**	**10.998**	**10.648**	**10.965**	**11.071**
Bulgaria	84	97	98	107	116	120
Romania	343	302	320	264	304	312
EU-27	**11.128**	**11.319**	**11.416**	**11.020**	**11.385**	**11.503**

[1)] between 2002 and 2003 Sweden changed the calculation methods, from 2003 the weight excludes bones. From: MEG 2009. (from EUROSTAT, FAO and national data)
Note: partial provisional or estimated. For EU countries. Some significant differences between national and EUROSTAT data. From August 2009.

POULTRY MEAT PRODUCTION IN THIRD COUNTRIES ('000 t carcass weight)

	2003	2004	2005	2006	2007	2008
Switzerland	56	60	58	52	60	64
Croatia	50	51	55	50	52	-
Turkey	886	894	953	933	1.083	-
Ukraine	324	375	497	589	689	-
Saudi Arabia	469	481	538	549	560	570
Japan	1.250	1.255	1.280	1.370	1.360	1.380
Thailand	1.302	996	1.038	1.150	1.230	1.300
China	13.135	13.237	14.055	14.286	15.042	15.800
Brazil*	7.905	8.723	9.681	9.707	10.700	11.471
USA*	17.225	17.925	18.539	18.680	19.090	19.574
World Production	**75.875**	**79.248**	**82.729**	**83.971**	**87.585**	**90.000**

From: MEG 2009. Partly provisional, partly estimated. From EUROSTAT, FAO and national data.
*Only chicken and turkey meat
From August 2009

TRADE

IMPORTS OF EU-COUNTRIES POULTRY MEAT ('000 t) [1)]

	2000	2003	2004	2005	2006	2007	2008
Poultry meat							
Austria	36	48	47	66	62	70	68
Belgium/Luxembourg	129	150	137	157	138	141	150
Denmark	17	27	33	39	43	37	40
Finland	3	4	4	5	4	4	5
France	153	176	180	207	211	260	275
Germany	386	407	419	470	407	457	371
Greece	87	79	51	56	48	50	56
Ireland	56	39	40	55	94	52	55
Italy	72	36	49	23	18	34	31
The Netherlands	175	252	261	283	280	408	490
Portugal	14	17	18	22	26	28	28
Spain	99	107	105	129	109	124	116
Sweden	14	24	30	33	39	35	37
United Kingdom	295	338	344	406	381	381	334
EU-15	**205**	**339**	**258**	**-**	**-**	**-**	**-**
Bulgaria					42	48	59
Cyprus	1	0	0	2	2	4	5
Czech Republic	18	33	54	56	58	53	62
Estonia	35	21	16	15	15	17	17
Hungary	21	17	27	43	31	33	45
Latvia	18	24	27	28	32	29	27
Lithuania	10	15	22	31	33	34	31
Malta	1	1	3	4	5	5	4
Poland	19	23	89	82	71	59	35
Romania					159	127	114
Slovak Republic	9	19	23	32	33	31	38
Slovenia	6	3	4	7	8	9	11
EU-25 /27 [5)]	**-**	**-**	**262**	**270**	**148**	**214**	**199**
Salted poultry meat [2)]							
Germany	62	120	0	0	30	62	60
The Netherlands	35	4	0	0	40	119	109
United Kingdom	9	17	1	0	7	19	23
EU from third countries [4)]	**109**	**137**	**0**	**3**	**86**	**219**	**199**
Preparation of poultry [3)]							
EU from third countries [4)]	**102**	**195**	**238**	**313**	**345**	**355**	**421**

[1)] Without preparations, livers, salted meat and live poultry. 2008 partly preliminary. Data in the EUROSTAT trade statistics and trade balance are partial different.

[2)] Tariff position "0210 9029" from 2002 "0210 99 39", almost exclusively poultry. German to the Federal Statistical Office, in particular by varying the light of intra-Community trade and corrections to the strong difference otherwise used EUROSTAT data..

[3)] Tariff position 1602 31..., 1602 32..., as well as 1602 39 21, 29, 40 and 80

[4)] According to the respective territorial forms

[5)] From 2007 EU 27.

From: MEG to EUROSTAT and national statistics - partly provisional, partly estimated. From August 2009

EXPORTS OF EU-COUNTRIES POULTRY MEAT ('000 t) [1)]

	2000	2003	2004	2005	2006	2007	2008
Austria	14	29	23	33	34	43	44
Belgium/Luxembourg	311	322	357	351	374	334	342
Denmark	124	121	121	114	99	94	89
Finland	2	11	12	12	14	14	14
France	736	626	596	560	460	481	484
Germany	158	275	275	323	323	385	327
Greece	6	6	8	11	8	16	14
Ireland	54	40	39	45	46	44	35
Italy	69	111	121	127	132	115	118
The Netherlands	722	661	613	605	716	873	812
Portugal	2	3	4	3	5	8	6
Spain	67	71	71	72	63	79	97
Sweden	16	14	13	13	38	46	29
United Kingdom	190	268	265	304	258	291	277
EU-15	**1.010**	**939**	**884**	**-**	**-**	**-**	**-**
Bulgaria					8	17	12
Cyprus	0	0	0	0	0	1	1
Czech Republic	9	13	24	27	21	22	22
Estonia	19	5	4	3	3	2	4
Hungary	122	110	125	111	91	104	120
Latvia	0	0	0	1	5	3	3
Lithuania	1	3	6	12	13	17	3
Malta	0	0	0	0	0	0	0
Poland	49	109	132	186	208	235	258
Romania					0	2	10
Slovak Republic	4	5	10	12	15	15	15
Slovenia	2	9	9	9	9	13	15
EU-25/27 [2)]	**-**	**-**	**936**	**889**	**872**	**756**	**857**

[1)] Without preparations, livers, salted meat and live poultry. 2008 partly preliminary. Data in the EUROSTAT trade statistics and trade balance are partial different.
[2)] From 2007, EU 27.
Source : MEG to EUROSTAT and national statistics.

THIRD COUNTRY TRADE IN POULTRY MEAT AND CHICKEN MEAT ('000 t)

	2003	2004	2005	2006	2007	2008
Total imports of poultry meat						
Switzerland	46	42	42	35	41	45
Imports of chicken meat						
Russia	1.081	1.016	1.225	1.189	1.222	1.159
Saudi Arabia	452	429	484	423	470	510
United Arab. Emirates	154	158	167	182	238	289
Japan	695	582	748	716	696	737
China	453	174	219	343	482	399
Hong Kong [1)]	154	244	222	243	215	236
Exports of chicken meat						
USA	2.232	2.170	2.360	2.361	2.618	3.158
Thailand	485	200	240	261	296	383
China	388	241	331	322	358	285
Brazil	1.922	2.425	2.762	2.586	3.007	3.600

[1)] Excluding transit goods.
From: MEG to USDA and national data. From August 2009.

PER CAPITA CONSUMPTION OF POULTRY MEAT IN EU (kilos)

	2003	2004	2005	2006	2007	2008
Austria	17,7	19,2	20,2	18,7	19,0	18,5
Belgium/Luxembourg	19,0	18,5	18,7	17,5	18,0	18,7
Denmark	21,2	23,0	23,5	21,7	22,5	24,0
Finland	15,8	15,9	16,2	15,6	16,5	17,0
France	25,3	23,3	23,0	22,6	23,5	24,5
Germany	17,6	17,7	17,5	16,7	17,8	18,8
Greece	22,8	19,6	20,9	19,3	20,0	20,5
Ireland	32,0	31,8	33,0	34,0	32,0	32,2
Italy	17,8	18,2	17,6	15,3	17,0	17,5
The Netherlands	18,6	21,9	22,1	21,9	22,5	22,5
Portugal	27,9	29,2	29,7	29,8	30,5	31,5
Spain	33,1	32,1	32,0	31,0	30,5	30,5
Sweden	13,9	13,5	13,0	12,8	12,5	13,0
United Kingdom	26,8	30,3	26,6	29,8	28,0	27,7
EU-15	**22,7**	**22,3**	**-**	**-**	**-**	**-**
Bulgaria						
Czech republic	22,7	24,2	24,9	25,7	24,0	23,8
Cyprus	37,4	38,4	-	-	-	-
Estonia	21,3	18,0	17,0	-	-	-
Hungary	37,6	37,9	37,7	32,0	32,8	31,7
Latvia	16,5	18,5	20,0	21,5	21,2	20,2
Lithuania	15,6	19,7	23,4	23,8	23,3	23,3
Malta	21,5	25,3	-	-	-	-
Poland	19,7	22,2	23,4	23,7	24,0	23,5
Romania	-	-	-	-	-	-
Slovak Republic	26,3	27,0	28,0	27,0	26,5	27,0
Slovenia	28,7	25,0	-	-	-	-
EU-25/27 [1]	**-**	**22,5**	**22,9**	**22,1**	**23,1**	**23,1**
Switzerland	13,0	12,9	12,3	14,3	15,9	17,0

[1] From 2007 EU 27

Note: Considerable discrepancies for some of the EU countries between EUROSTAT and national statistics. From: MEG to EUROSTAT, USDA and national statistics.

SELF-SUFFICIENCY OF THE EU MEMBER STATES

	2003	2004	2005	2006	2007	2008
Austria	78	73	68	70	71	80
Belgium/Luxembourg	155	180	170	180	175	165
Denmark	180	172	160	157	150	145
Finland	101	105	102	106	106	105
France	140	136	133	125	122	120
Germany	74	80	83	86	86	87
Greece	67	76	76	79	82	79
Ireland	99	100	95	90	95	85
Italy	107	107	107	110	107	106
The Netherlands	153	170	172	172	186	188
Portugal	93	95	95	92	93	93
Spain	97	96	95	96	96	96
Sweden	85	80	78	85	90	85
United Kingdom	99	87	90	85	95	98
EU-15	**103**	**106**	**-**	**-**	**-**	**-**
Bulgaria	-	-	-	-	-	-
Czech republic	91	88	89	86	87	84
Cyprus	-	-	-	-	-	-
Estonia	50	60	40	-	-	-
Hungary	124	125	118	119	121	124
Latvia	30	35	40	45	45	49
Lithuania	78	76	76	75	78	80
Malta	-	-	-	-	-	-
Poland	107	105	111	112	112	118
Romania	-	-	-	-	-	-
Slovak Republic	88	88	83	85	86	83
Slovenia	-	-	-	-	-	-
EU-25/27 [1)]	**-**	**106**	**105**	**105**	**101**	**101**

[1)] From 2007 EU 27

Note: Considerable discrepancies for some of the EU countries between EUROSTAT and national statistics. Partly provisional, partly estimated. From: MEG to EUROSTAT and national statistics, From August 2009.

BROILER

GROSS INDIGENOUS BROILER PRODUCTION IN EU AND THIRD COUNTRIES ('000 t)

	2003	2004	2005	2006	2007	2008
Austria	84	84	87	81	87	87
Belgium/Luxembourg	275	280	266	262	254	250
Denmark	181	181	180	163	171	175
Finland	69	72	72	75	84	92
France	1.005	973	986	886	993	1.010
Germany	619	706	741	749	826	877
Greece	163	168	165	150	161	160
Italy	685	675	666	612	670	710
Ireland	95	95	95	90	96	91
The Netherlands	489	538	552	547	612	625
Portugal	208	224	226	219	245	248
Spain	1.041	1.053	1.045	1.030	1.034	1.059
Sweden	95	70	72	75	76	77
United Kingdom	1.303	1.301	1.334	1.289	1.268	1.259
EU-15	**6.312**	**6.420**	**6.487**	**6.228**	**6.577**	**6.720**
Bulgaria	60	71	80	87	98	89
Czech republic	185	207	206	203	195	191
Cyprus	33	33	33	27	28	28
Estonia	15	16	14	14	14	14
Hungary	238	236	235	215	217	230
Latvia	12	14	17	21	21	21
Lithuania	39	49	57	61	63	65
Malta	7	6	5	4	5	5
Poland	610	640	698	716	730	735
Romania	344	303	309	273	312	312
Slovak Republic	85	84	87	86	83	83
Slovenia	47	43	46	44	52	52
EU-25/27 [1]	**7.583**	**7.748**	**7.885**	**7.619**	**8.395**	**8.545**
Switzerland	51	53	50	52	60	64
Brazil	7.645	8.408	9.321	9.354	10.305	11.033
China	9.447	9.483	9.964	10.164	10.617	11.100
USA	14.696	15.451	16.042	16.103	16.387	16.741
Russia	560	650	900	1.180	1.350	1.600

[1] From 2007 EU 27

Note: Mostly provisional, respectively estimated; official statistics on broiler production and consumption only available from few countries. EU-data based on gross national production.

From: MEG to USDA and national statistics.

PER CAPITA CONSUMPTION OF BROILERS IN SELECTED EU AND THIRD COUNTRIES (kilos)

	2003	2004	2005	2006	2007	2008
Austria	11,3	12,1	12,1	11,5	11,7	22,2
France	11,6	11,8	11,9	11,5	12,6	13,5
Germany	9,0	9,2	9,3	9,0	10,1	11,1
Italy	10,8	11,0	10,2	9,5	10,7	11,1
The Netherlands	16,6	17,3	17,5	17,5	18,2	18,4
United Kingdom	21,2	23,0	21,3	23,5	22,5	29,9
EU-15	**15,4**	**-**	**-**	**-**	**-**	**-**
EU 27	**-**	**15,6**	**16,5**	**15,5**	**16,4**	**17,1**
3rd countries						
Argentine	-	21,7	24,1	28,3	30,5	31,7
Brazil	33,3	33,9	35,9	36,8	39,2	39,9
China	7,5	7,5	7,6	7,7	8,5	9,1
India	1,5	1,5	1,7	1,8	2,0	1,3
Iran	-	16,9	17,3	18,6	20,3	19,9
Japan	14,4	13,4	14,7	15,4	15,2	15,2
Mexico	24,9	25,9	27,1	28,1	28,3	30,1
Russia	12,6	11,8	15,0	16,7	18,1	19,3
South Africa	-	21,1	23,5	26,2	26,9	26,0
United Arab Emirates	44,0	43,1	42,6	-	-	-
USA	43,3	44,6	44,9	45,4	44,8	44,1

Note: From August 2009. Partly provisional, partly estimated; only available for a few countries and databases not always kept up to date.
From: MEG, according to MEG's own and national estimates and other sources of information.

TURKEY

TURKEY PRODUCTION IN EU AND THIRD COUNTRIES ('000 t)

	2003	2004	2005	2006	2007	2008
Austria	20	20	21	20	21	21
Belgium/Luxembourg	5	6	7	7	4	4
Denmark	7	1	1	0	0	0
Finland	14	15	14	12	11	11
France	632	624	545	519	469	452
Germany	352	358	349	331	330	357
Greece	2	3	3	1	3	3
Ireland	29	31	31	27	25	16
Italy	296	298	293	276	290	300
The Netherlands	20	32	31	30	30	29
Portugal	40	38	39	41	42	40
Spain	23	21	20	21	18	25
Sweden	4	4	3	3	3	3
Great Britain	229	228	206	184	154	137
EU-15	**1.673**	**1.679**	**1.563**	**1.472**	**1.400**	**1.398**
Bulgaria	3	2	1	0	1	1
Czech Republic	18	19	13	9	4	4
Cyprus	1	1	1	1	1	1
Estonia	-	-	-	-	-	-
Hungary	120	143	118	127	126	120
Latvia	-	-	-	-	-	-
Lithuania	-	-	-	4	-	-
Malta	0	0	0	0	0	0
Poland	216	236	257	272	285	285
Romania	-	-	-	-	-	-
Slovak Republic	2	1	1	1	-	-
Slovenia	8	8	8	8	7	-
EU-25/EU 27 [1)]	**2.052**	**2.101**	**1.975**	**1.908**	**1.840**	**1.825**
Brazil	260	315	360	353	390	438
USA	2.529	2.474	2.497	2.577	2.703	2.833
Canada	145	145	155	163	169	172

[1)] From 2007 EU 27

Note: Partly provisional, partly estimated; official statistics on turkey production only available from few countries. EU data are based on gross domestic production.

From: MEG to FAO, USDA and national statistics.

PER CAPITA CONSUMPTION OF TURKEYS IN SELECTED EU AND THIRD COUNTRIES (kilos)

	2003	2004	2005	2006	2007	2008
Austria	5,2	6,0	6,9	6,0	6,1	5,9
France	6,2	6,0	5,8	5,6	5,3	5,1
Germany	6,4	6,5	6,2	5,9	5,7	5,7
Italy	5,2	5,3	5,0	4,5	5,0	-
The Netherlands	2,2	1,9	1,9	1,6	1,5	1,3
United Kingdom	4,0	5,0	4,0	4,5	4,0	3,9
EU-15	**4,5**	**-**	**-**	**-**	**-**	**-**
EU 27	**-**	**4,0**	**3,8**	**3,7**	**3,7**	**3,5**
3rd countries						
Brazil	0,5	1,0	1,1	1,1	1,5	1,5
Canada	4,5	4,4	4,5	4,5	4,6	4,7
Mexico	1,6	1,5	1,9	1,9	2,0	2,0
Russia	0,6	0,8	0,9	0,8	0,7	0,8
USA	7,9	7,8	7,6	7,6	7,9	8,0

Note: Partly provisional, partly estimated; official statistics on turkey consumption only available from few countries.
From: MEG according to own and national estimates and information.

For further data and information:

MEG- Marktinfo Eier & Geflügel

Tel: +49 (0)228 - 629 47 971

Fax: +49 (0)228 - 962 00 987

http://www.marktinfo-eier-gefluegel.de

mbeck@ulmer.de

DUCK

DUCK PRODUCTION IN EU 27 ('000 t)

	2003	2004	2005	2006	2007	2008
Austria	0,2	0,2	0,2	0,2	0,2	0,2
Belgium/Luxembourg	0,1	0,2	0,2	0,2	0,0	0,3
Denmark	4,2	4,2	4,1	4,5	0,0	0,0
Finland	0,0	0,0	0,0	0,0	0,0	0,0
France	240,0	239,0	252,0	261,5	272,0	260,0
Germany	50,2	45,0	50,8	49,8	64,0	69,0
Greece	0,1	0,2	0,3	0,1	0,2	0,2
Ireland	5,9	6,3	6,5	6,5	6,5	5,8
Italy	15,0	15,0	15,0	15,0	15,0	15,0
The Netherlands	11,2	13,0	16,0	17,0	17,0	17,0
Portugal	8,0	8,0	8,0	8,0	9,0	10,0
Spain	0,0	0,0	0,0	0,0	0,0	0,0
Sweden	0,1	0,1	0,2	0,2	0,2	0,0
United Kingdom	46,0	41,0	45,0	45,0	38,0	35,2
EU-15	**381,0**	**372,2**	**398,3**	**408,0**	**422,1**	**412,7**
Bulgaria	6,9	7,1	16,1	18,2	16,8	13,0
Cyprus	0,2	0,2	0,2	0,2	0,2	0,2
Czech republic	4,2	3,7	3,8	3,8	5,9	8,8
Estonia	-	-	-	-	-	-
Hungary	64,0	55,0	63,0	42,0	58,0	49,0
Latvia	-	-	-	-	-	-
Lithuania	-	-	-	0,2	0,2	-
Malta	-	-	-	-	-	-
Poland	17,2	17,1	18,2	16,0	17,0	16,0
Romania	-	-	-	-	-	-
Slovak Republic	9,3	0,6	0,5	1,0	0,5	-
Slovenia	1,2	1,2	1,2	1,2	1,2	-
EU-25/EU 27 [1]	**494,0**	**467,0**	**511,0**	**501,0**	**532,0**	**513,0**

[1] From 2007 EU 27

Note: : Partly provisional, partly estimated (basis: own gross production); official statistics on duck production only available from few countries.
From: MEG from national statistics.

POULTRY MEAT MARKET PROJECTIONS FOR THE EU-27, 2006-2015 ('000 T CWE)

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Gross indigenous Production	**11.235**	**11.487**	**11.671**	**11.740**	**12.181**	**11.995**	**11.960**	**12.175**	**12.367**	**12.502**
Of which chicken meat	8.800	9.059	9.216	9.299	9.788	9.487	9.393	9.632	9.825	9.954
Of which EU 15	6.273	6.584	6.708	6.758	7.093	6.881	6.807	6.964	7.099	7.178
Of which EU 12	2.527	2.475	2.508	2.541	2.695	2.605	2.587	2.668	2.726	2.776
Of which other poultry	2.435	2.428	2.454	2.442	2.394	2.508	2.566	2.543	2.541	2.549
Import	**734**	**824**	**817**	**826**	**828**	**836**	**842**	**848**	**855**	**863**
Exports	**865**	**786**	**877**	**804**	**792**	**773**	**759**	**762**	**760**	**758**
Net trade	**130**	**-38**	**60**	**-23**	**-35**	**-63**	**-83**	**-86**	**-95**	**-105**
Consumption	**11.105**	**11.526**	**11.611**	**11.763**	**12.217**	**12.058**	**12.042**	**12.261**	**12.462**	**12.607**
Per Capita Consumption	**22,6**	**23,4**	**23,4**	**23,6**	**24,5**	**24,1**	**23,9**	**24,3**	**24,6**	**24,8**
Of which chicken meat	17,8	18,6	18,6	18,9	19,8	19,1	18,9	19,2	19,5	19,7
EU 15	16,4	17,0	17,1	17,3	18,4	17,4	17,0	17,4	17,7	17,9
EU 12	23,0	24,3	24,4	24,8	25,1	25,8	26,3	26,5	26,6	26,7
Of which other poultry	4,8	4,8	4,8	4,8	4,7	4,9	5,1	5,1	5,1	5,2

OVERALL MEAT MARKET PROJECTIONS FOR THE EU -27, 2006-2015('000 T CWE)

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Gross Indigenous Production	**42.519**	**43.704**	**43.498**	**42.691**	**43.787**	**43.877**	**43.593**	**43.788**	**44.170**	**44.643**
Of which EU 15	32.672	33.910	33.900	33.362	34.167	34.001	33.614	33.704	33.986	34.380
Of which EU 12	7.412	7.366	7.143	6.888	7.227	7.368	7.412	7.532	7.642	7.714
Live imports	**1**	**1**	**1**	**1**	**1**	**1**	**1**	**1**	**1**	**1**
Live exports	**97**	**84**	**114**	**111**	**111**	**111**	**111**	**111**	**111**	**111**
Net production	**42.424**	**43.622**	**43.384**	**42.580**	**43.677**	**43.767**	**43.482**	**43.668**	**44.059**	**44.533**
Imports	**1.732**	**1.668**	**1.514**	**1.578**	**1.637**	**1.714**	**1.768**	**1.790**	**1.790**	**1.807**
Exports	**2.466**	**2.300**	**2.845**	**2.058**	**1.994**	**1.993**	**1.929**	**1.926**	**1.901**	**1.880**
Net trade	**734**	**632**	**1.331**	**480**	**357**	**278**	**160**	**136**	**112**	**73**
Consumption	**41.690**	**42.890**	**42.153**	**42.100**	**43.319**	**43.488**	**43.322**	**43.531**	**43.947**	**44.460**
Of which EU 15	25.462	26.338	25.697	25.457	26.123	26.383	26.212	26.167	26.323	26.647
Of which EU 12	5.162	5.067	4.888	4.923	5.023	5.091	5.111	5.148	5.207	5.250
Per capita consumption	84,9	87,0	85,1	84,6	86,7	86,8	86,1	86,3	86,8	87,6
Beef and Veal	17,4	17,5	17,1	16,9	16,9	16,8	16,8	16,7	16,6	16,5
Sheep/goat	2,8	2,8	2,6	2,6	2,6	2,5	2,5	2,5	2,5	2,5
Pig meat	42,0	43,3	41,9	41,5	42,9	43,3	42,9	42,8	43,1	43,7
Poultry	22,6	23,4	23,4	23,6	24,5	24,1	23,9	24,3	24,6	24,8
Of which EU 15	**65,7**	**67,5**	**65,5**	**64,6**	**65,9**	**66,2**	**65,5**	**65,1**	**65,2**	**65,8**
Of which EU 12	**49,9**	**49,0**	**47,3**	**47,8**	**48,8**	**49,5**	**49,7**	**50,1**	**50,7**	**51,2**

From: Prospects for agricultural markets and income in the European Union 2008-2015, The European Commission, March 2009

TABLE EU 27 IMPORTS OF TARIFF LINES

EU 27 IMPORTS, 2000, 2005, 2007,2008 Source: Eurostat July 2009

Period	2000	2005	2007			2008		
CN code	QUANTITY 100 KG	QUANTITY 100 KG	QUANTITY 100 KG	VALUE EUROS	VALUE €/100 KG	QUANTITY 100 KG	VALUE EUROS	PRICE €/100 KG
0207 imports	1.291.598	4.321.446	2.139.089	382.910.021	**179,00**	1.990.147	371.604.161	**186,72**
0207 exports	9.586.332	8.566.144	7.561.819	721.063.094	**95,35**	8.571.920	905.133.318	**105,59**
Total imports	2.153.649	7.445.287	7.889.752	1.698.022.742	**215,22**	8.198.237	1.963.217.284	**239,47**
Total exports	9.881.259	8.868.269	7.915.752	820.299.455	**103,62**	9.011.463	1.032.231.472	**114,55**

Period		2000	2005	2007		2008		
CN code	Product definition	QUANTITY 100 KG	QUANTITY 100 KG	QUANTITY 100 KG	VALUE €/100 KG	QUANTITY 100 KG	VALUE EUROS	VALUE €/100 KG
02713	Cuts and offals, fresh or chilled, Gallus domesticus	**15.753**	**1.528**	**551**	**203,99**	**4.407**	**1.096.993**	**248,92**
02071310	Fresh or chilled boneless cuts of fowls of the species Gallus domesticus	221	291	232	**225,48**	3.361	742.386	**220,88**
02071320	Fresh or chilled halves or quarters of fowls of the species Gallus domesticus	411		51	**92,94**	748	86.030	**115,01**
020714	Cuts and offals, frozen, Gallus domesticus	**1.106.880**	**3.870.851**	**1.748.427**	**178,65**	**1.630.054**	**300.498.861**	**184,35**
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	657.901	2.408.760	1.132.425	**232,54**	1.114.813	256.342.962	**229,94**
02071420	Frozen halves or quarters of fowls of the species Gallus domesticus	195.491	716.288	103.688	**74,55**	79.378	6.901.585	**86,95**
2071460	Frozen legs and cuts thereof of fowls of the species gallus	131.120	406.058	182.724	**104,29**	134.418	14.856.064	**110,52**
020726	Cuts and offal fresh or chilled turkey	**2.831**	**1.009**	**654**	**430,98**	**1.721**	**549.567**	**319,33**
02072610	Fresh or chilled boneless cuts of turkeys of the species domesticus	2.551	65	578	**422,9**	1.095	422.879	**386,19**
020727	Cuts and offal, frozen turkey	**102.387**	**296.425**	**170.556**	**269,71**	**165.869**	**45.279.404**	**272,98**
02072710	Frozen boneless cuts of turkeys of the species domesticus	79.809	168.457	137.670	**305,57**	128.386	41.236.968	**321,20**
02072750	Frozen breasts and cuts thereof of turkeys of the species domesticus, with bone in	207	4.341	6.498	**257,37**	3.100	997.398	**321,74**
020733	Not cut in pieces, frozen, other poultry	**11.030**	**29**	**2**	**218**	**178**	**49.743**	**279,46**
02073319	Frozen, plucked and drawn ducks of the species domesticus, known as "63% ducks", and other forms of ducks, not cut in pieces (excl. "85% and 70% ducks)	10.788	17	2	**218**	178	49.743	**279,46**
02109939	Meat, salted, in brine, dried or smoked		**32.804**	**2.192.366**	**204,42**	**1.993.941**	**419.898.479**	**210,59**

Period		2000	2005	2007		2008		
CN code	Product definition	QUANTITY 100 KG	QUANTITY 100 KG	QUANTITY 100 KG	VALUE €/100 KG	QUANTITY 100 KG	VALUE EUROS	VALUE €/100 KG
0160231	**Prepared, preserved meat of turkeys**	**300.920**	**945.610**	**847.409**	**215,64**	**1.032.144**	**269.437.484**	**261,05**
16023111	Preparations containing exclusively uncooked turkey meat (excl. sausages and similar products)	289.398	927.902	820.966	**210,89**	998.285	256.865.299	**257,31**
16023119	Meat or offal of turkeys "Gallus domesticus", prepared or preserved, containing ≥ 57% by weight of meat or offal of poultry	10.054	14.337	23.506	**358,25**	30.688	11.156.490	**363,55**
16023130	Meat or offal of turkeys "Gallus domesticus", prepared or preserved, containing ≥ 25% but < 57% by weight of meat or offal of poultry	123	965	159	**452,29**	23	11.858	**515,57**
16023190	Meat or offal of turkeys "Gallus domesticus", prepared or preserved (excl. containing ≥ 25% of meat or offal of poultry etc.)	1.345	2.406	2.778	**400,75**	3.148	1.403.837	**445,95**
160232	**Uncooked, prepared or preserved meat of fowl of Gallus domesticus**	**542.887**	**2.075.458**	**2.578.158**	**241,2**	**3.081.727**	**844.367.437**	**273,99**
16023211	Uncooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing ≥ 57% meat or offal of poultry	38.322	382.051	67.167	**228,48**	97.433	20.662.700	**212,07**
16023219	Cooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing ≥ 57% meat or offal of poultry	496.559	1.630.358	2.240.912	**248,02**	2.487.002	725.445.051	**291,69**
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.)	7.203	56.310	260.599	**180,81**	483.563	92.914.095	**192,14**
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.)	804	6.739	9.480	**380,79**	13.729	5.345.591	**389,36**
160239	**Prepared, preserved meat of other poultry**	**18.244**	**69.969**	**132.730**	**469,69**	**100.278**	**57.909.723**	**577,49**
16023921	Uncooked, prepared or preserved meat or meat offal of ducks, geese and guinea fowl of the species domesticus, containing ≥ 57% meat or offal of poultry	16	82	82	**526,13**	78	47.900	**614,10**
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	16.642	56.094	127.048	**468,35**	96.958	56.258.511	**580,24**
16023940	Prepared or preserved meat or meat offal of ducks, geese and guinea fowl of the species domesticus, containing ≥ 25% but < 57% meat or offal of poultry	0	8.042	1.929	**413,32**	1.298	526.533	**405,65**
16023980	Prepared or preserved meat or meat offal of ducks, geese and guinea fowl of the species domesticus (excl. that containing ≥ 25% meat or offal of poultry, etc.)	1.585	5.751	3.671	**544,32**	1.944	1.076.780	**553,90**

UPCOMING AND PENDING LEGISLATIVE PROPOSALS

ANIMAL WELFARE

Review of the Directive 93/119 on the protection of animals at the time of slaughter

The Council reached political agreement on the proposal for a Council Regulation 2008/553 on June 22, 2009. Many issues are at stake for **avec**; shackling time, stunning currents, stimulation, severance etc. The regulation is expected to enter into force in January 2013.

Labeling of animal welfare

At present many different schemes and possibilities are presented within the different Member States. **avec** finds it important that the information given to consumers is transparent, reliable **and** not creating unnecessary confusion. a.v.e.c. promotes comprehensive instead of one issue labeling and follows closely the next steps on the labeling proposal. A delayed Commission report is expected in July 2009.

Review of regulation 1/2005 on the protection of animals during transport

The proposal is still within the Commission services and poultry issues have not been finalized. **avec** is following further steps closely and has repeatedly sent its position.

Minimum rules for protection of chickens kept for meat production, Directive 2007/43

The Directive enters into force June 30, 2010. The Directive lays down rules for maximum stocking density, drinking facilities, litter, feeding, ventilation, heating, light, noise, cleanliness and surgical interventions. EFSA has a mandate for 2 opinions by June 2010 (genetic influence on welfare of broilers and management and housing influence on (grand) parents' welfare). **avec** wants effective and harmonized conditions in Member States and works with EPB and EFFAB on input to EFSA on the genetic parameters.

ANIMAL HEALTH

COM 539/2007, Animal Health Law

The Commission has in May 2008 published a scoping paper on a horizontal legal framework, an Animal Health Law to integrate principles and requirements of trade, imports, animal disease control and welfare. A public consultation on the framework will be formally carried out in 2009. A proposal is expected to be presented in December 2010.

Regulation 616/2009 on poultry compartments

avec's work with the EPB and the Commission on compartmentalisation measures has resulted into the Commission regulation which will enable operators to establish compartments. It will come into force on 1st October 2009 and concerns only compartmentalisation with respect to AI within the Member States.

Draft regulation for novel foods COM (2008) 0872 to include cloned animals

Despite the very cautious scientific opinion of ESFA published in July 2008 and the European Parliament's ban on food from cloned animals and their offspring in September 2008 the Council of Ministers decided in June 2009 to include food produced from animals obtained by cloning techniques and from offspring of cloned animals in the draft regulation for novel foods. A reaction from the European Parliament is expected.

FOOD AND FEED SAFETY

Evaluation of the Hygiene Package - 852, 853, 854/2004

The process of revision of the Hygiene “package” (regulation 852/2004 on hygiene of foodstuffs, regulation 853/2004 laying down specific hygiene rules for food of animal origin, and regulation 854/2004 laying down detailed rules for the organisation of official controls on products of animal origin intended for human consumption) has started in May 2008 and is still ongoing. The Commission is expected to publish its evaluation report soon. At stake for **avec** are among other the definition of “fresh” and “MSM”. **avec** follows closely the next steps.

Regulation 2160/2003 on the reduction of Salmonella in poultry meat

The Regulation requires 'absence of Salmonella in 25 g poultry meat' from December 2010. **avec** and other stakeholders are involved in the drafting of a comprehensive impact assessment with the Commission. Issues like consumer confidence, lack of regulation consistency and discrimination of meat types are at stake.

Proposal COM (2008) 345 - amending regulation 1774/2002 on animal by-products

The discussion of Regulation 1774/2002 on animal by-products is coming to a final stage. The Agricultural Council has agreed with the EP about the text. A revised draft is expected during the Swedish presidency. After adoption by the Council, a transitional period of 15 months will start during which the Commission will present further implementing measures. In October 2009 stakeholders will be invited to a meeting on the latest developments.

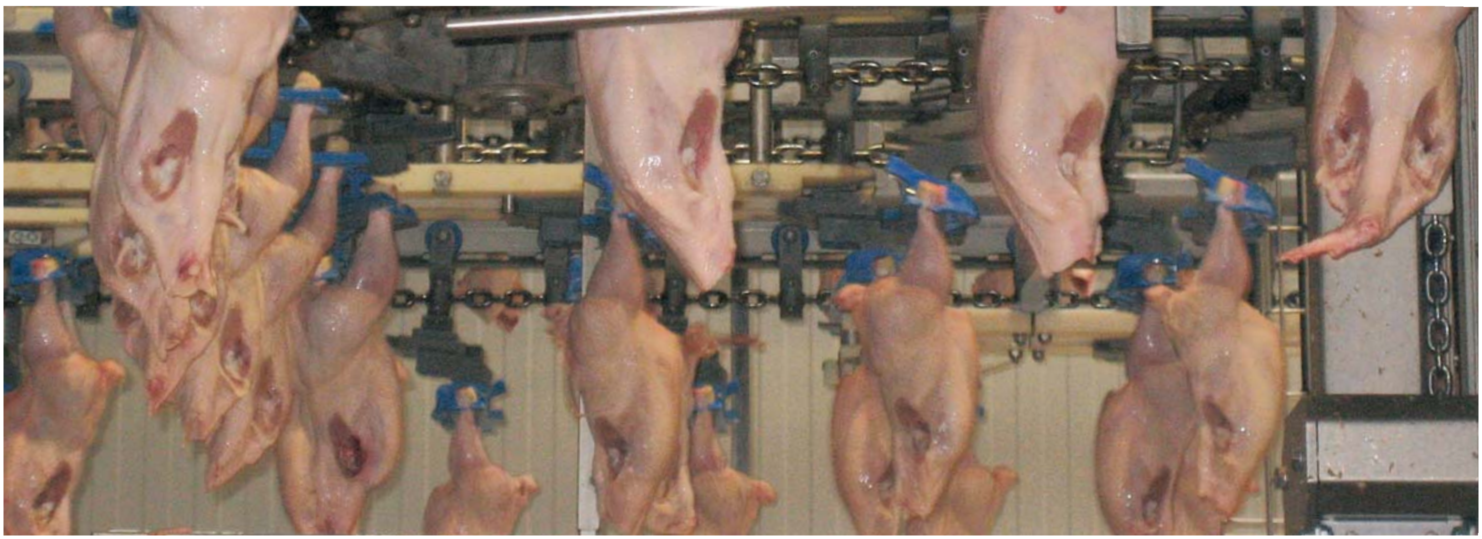
COM (2008) 40 proposal on the provision of food information to consumers - revision of existing regulations on general food labeling and nutrition labeling

In January 2008 the Commission adopted a proposal for a revision on existing legislation on food and nutrition labeling. The proposal COM (2008) 40 final concerns labeling of prepared products. The Parliament is preparing a first report for discussion in September 2009. The Council is expected to conclude in December 2009. **avec** will continue to follow the next steps closely.

MARKETING STANDARDS

COM (2008) 336 amending Regulation (EC) No 1234/2007 establishing a common organisation of agricultural markets as regards the marketing standards for poultrymeat.

Proposal for a Council Regulation amending Regulation (EC) 1234/2007 on marketing standards for poultry meat is in the final phase. **avec** has actively promoted the definition "fresh" included in the final proposal. The proposal is notified and waiting for final approval in July 2009. Brazil and China have reacted on the notification. It will probably be on the agenda of the Council meeting in September 2009 for adoption.



PUBLICATIONS AND STUDIES OF INTEREST TO THE POULTRY SECTOR

ON SUSTAINABLE AGRICULTURE, DEVELOPMENT AND SUSTAINABLE POULTRY MEAT:

IMPRO study on sustainable meat production from the Commission's Joint Research Centre and IPTS, April 2008: poultry meat most sustainable of meats:
http://ftp.jrc.es/EURdoc/JRC46650.pdf

DG AGRI on agriculture's impact on the environment, April 2009
http://ec.europa.eu/agriculture/climate_change/index_en.htm

Defra's guide for businesses on how to measure their carbon footprints - uk 2050:
http://www.defra.gov.uk/news/latest/2008/climate-1029.htm

FAO on IPPC mitigating greenhouse gases especially in agriculture in developing countries, May 2009 link:
http://www.fao.org/news/story/en/item/20243/icode/

For FSA: Comparison of putative health effects of organically and conventionally produced foodstuffs: a systematic review, July 2009
http://www.food.gov.uk/multimedia/pdfs/organicreviewreport.pdf

Food miles report New zealand 2006, Lincoln University, on agriculture's food miles in NewZealand - link
http://www.lincoln.ac.nz/story_images/2328_RR285_s13389.pdf

Bioforsk, Norwegian Research Centre on sustainable agriculture: has carried out a study on different agricultural systems and found that conventional agriculture with limited use of fertiliser and pesticides is more sustainable than biological agriculture - link:
http://www.bioforsk.no/ikbViewer/page/prosjekt/forside?p_dimension_id=16927&p_menu_id=16934&p_sub_id=16928&p_dim2=16928

ON ANIMAL WELFARE:

Dutch study unfavorable to the electrical stunning of poultry ordered by the Dutch Ministry of Food and Agriculture, June 2009:
http://www.avec-poultry.eu/graphics/archive/Key_issues/Animal_welfare/Letters/Dutch%20situation%20evaluated%20ASG%2020090429_DL_2009_956_bijlage%5B1%5D.pdf

Colorado State University June 2008 evaluation of gas stunning compared to electrical stunning of poultry. link:
http://www.grandin.com/gas.stunning.poultry.eval.html

World poultry, Volume 21, No 9, 2005, Wiebe van der Sluis, article on evaluation of different gas stunning systems - link:
http://www.agriworld.nl/public/file/pdf/20060504-wpcs21.9.pdf

ON ANIMAL HEALTH:

Avian Flu update from DG Sanco's website:
http://ec.europa.eu/food/animal/diseases/controlmeasures/avian/index_en.htm

Avian Flu daily update from OIE:
http://www.oie.int/downld/AVIAN%20INFLUENZA/A_AI-Asia.htm

STATISTICS - AGRIFOOD BUSINESS AND TRADE:

OECD-FAO Agricultural outlook 2009-2018. Link:
http://www.oecd.org/pages/0,3417,en_36774715_36775671_1_1_1_1_1,00.html

Agricultural commodity markets - outlook - 2009-2018. Link :
http://ec.europa.eu/agriculture/analysis/tradepol/worldmarkets/index_en.htm

EU and World cereal markets July 2009. Link :
http://circa.europa.eu/Members/irc/agri/ag-op/library?l=/2_documentation/2009/03-07-09/090703advisoryppt/_EN_1.0_&a=d

CONSUMER CONFIDENCE AND TRENDS:

Eurostat's guide to consumers in 2009:
The guide contains useful information on consumer profiles, consumption, prices, satisfaction and complaints, quality and safety, consumer markets for food and much more. Link to the report published in July 2009.
http://ec.europa.eu/consumers/strategy/consumers_europe_edition2_en.pdf

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*BM: Board member
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BELGIUM

V.I.P. –België
Vereniging van Industriële Pluimveeslachterijen
Korsele 70
9667 Horebeke
Belgium

Phone: +32 55 49 99 70 - Fax: +32 55 45 78 56
E-mail: vip-belgie@skynet.be

CZECH REPUBLIC

Sdruzeni Drubezarskych Podniku
Dopravaku 3/749
184 00 Praha 8
The Czech Republic

Phone: +420 272 774 686 - Fax: +420 272 766 136
E-mail: sdruzeni.dp@volny.cz

DENMARK

Danish Poultry Meat Association
Axelborg
Axeltorv 3, 7th floor
1609 Copenhagen V
Denmark

Phone: +45 33 73 25 00 - Fax: +45 33 25 30 14
E-mail: ksv@poultry.dk
www.danskfjerkrae.dk

FINLAND

The Finnish Poultry Processing
Industries Association
P.O. Box 115
00241 Helsinki
Finland

Phone: +358 9 14 88 71 - Fax: +358 9 14 88 72 01
E-mail: marika.saynevirta@etl.fi

FRANCE

Fédération des Industies Avicoles (F.I.A.)
184, rue de Vaugirard
75015 Paris
France

Phone: +33 1 53 58 48 10 - Fax: +33 1 53 58 48 19
E-mail: contact@fia.fr
www.fia.fr

Comité Interprofessionnel de la Dinde (CIDEF)
11, rue de Plaisance
B.P. 24
35310 Mordelles
France

Phone : +33 2 99 60 31 26 - Fax : +33 2 99 60 58 67
E-mail : cidef@wanadoo.fr

GERMANY

Bundesverband der Geflügelschlachtereien e.V.
Claire-Waldoff-Strasse 7
10117 Berlin
Germany

Phone: +49 30 28 88 31 10 - Fax: +49 30 28 88 31 50
E-mail: bvg@zdg-online.de
www.zdg-online.de

GREECE

Greek Poultry Industry Association
54 Menandrou Street
104 31 Athens
Greece

Phone: +30 10 52 38 190 - Fax: +30 10 52 27 370
E-mail: k.yazitzoglou@hqf.gr

HUNGARY

BTT- Baromfi Termék Tanács
Akadémia u.1.
1245 Budapest 5, Pf. 1027
Hungary

Phone: +361 269 2998 - Fax: +361 269 2995
E-mail: btt@mail.tvnet.hu
www: magyarbaromfi.hu

ITALY

UNA – Unione Nazionale dell'Avicoltura
Via Vibio Mariano 58
00189 Roma
Italy

Phone: +39 0633 25 841 - Fax: +39 0633 25 24 27
E-mail: una@unionenazionaleavicoltura.it
www.unionenazionaleavicoltura.it

NETHERLANDS

NEPLUVI
Postbus 331
3990 GC Houten
Netherlands

Phone: +31 30 63 55 252 - Fax: +31 30 65 71 114
E-mail: info@nepluvi.nl
www.nepluvi.nl

POLAND

Krajowa Rada Drobiarstwa- Izba Gospodarcza (KRD- IG)
Ul. Czackiego 3/5
00-043 Warszawa
Poland

Phone: +48 (0-22)33 61 338 - Fax: +48 (0-22) 82 82 389
E-mail: krdig@pro.onet.pl, krd-ig@krd-ig.com.pl
www.krd-ig.com.pl

PORTUGAL

ANCAVE
Av. Miguel Bombarda, 120 - 3°
1050-167 Lisboa
Portugal

Phone: +351 21 79 66 439 - Fax: +351 21 47 40 723
E-mail: ancave@mail.telepac.pt

ROMANIA

Uniunea Crescatorilor de Pasari Din Romania
Bdul Ion Mihalache nr. 106, bloc 84, Scara A, Ap. 24, Sector 1
Bucaresti
Romania

Phone: +40 01 666 37 65 - Fax: +40 01 666 37 65
E-mail: ilievan@yahoo.com
www.desprepui.ro

SLOVENIA

GIZ MESNE INDUSTRIJE
Dimičeva 9
1000 Ljubljana
Slovenia

Phone: +386 1 565 74 10 - Fax: +386 1 565 92 45
E-mail: giz.mi@siol.net

SPAIN

AMACO
Diego de León 33, 4° D
28006 Madrid
Spain

Phone: +34 91 51 58 545 - Fax: +34 91 51 58 546
E-mail: amaco@amaco.es

PROPOLLO
Diego de León 33, 4° D
28006 Madrid
Spain

Phone: +34 91 562 42 93 - Fax: +34 91 56 23 231
E-mail: propollo@propollo.com

SWEDEN

Svensk Fågel Service AB
105 33 Stockholm
Sweden

Phone: +46 8 787 55 20 - Fax: +46 8 787 53 21
E-mail: maria.donis@svenskfagel.se
www.svenskfagel.se

UNITED KINGDOM

British Poultry Council
Europoint House
5, Lavington Street
London SE1 0NZ
United Kingdom

Phone: +44 (0) 845 302 28 33 - Fax: +44 (0) 207 928 63 66
E-mail: bradnock@poultry.uk.com

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Association of Poultry Processors and Poultry Trade in the EU Countries