2012 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

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a.v.e.c. *wants to thank BPC, CIDEF, Rose Poultry, MEG Marktbilanz and Wiesenhof for their contribution to the annual report 2012*

INTRODUCTION

The EU 2020 targets for smart, sustainable and inclusive growth represents for all, including the poultry industry, a milestone and a challenge. How will the decisions of today be reflected in production, processing and consumption of poultry meat in 2020? Through its proactive programme of work over the last twelve months a.v.e.c. has secured developments which will help to meet the future challenges and achieve positive outcomes for the EU poultry sector,

In trade relations **a.v.e.c**. has requested greater attention to be given at EU level to fair competition on the internal and external markets. In particular the high EU standards for animal health and welfare, food safety and environmental protection should be recognised and should apply also to imported poultry meat. The EU poultry sector is sensitive to imports. When poultry quotas are granted in trade agreements with third countries the volume should be fairly allocated to the whole carcass, boneless meat and cuts with bone, without substitution.

a.v.e.c. is proactively working on the upcoming revision of the marketing standards and the result of the discussions will be presented to the Commission for the next amendment of the regulations.

From 1 December 2011, the poultry industry has had to comply with the requirement that chicken meat placed on the market must be free of Salmonella enteritidis and typhimurium in samples of 25 grams. This will further reduce the prevalence of Salmonella in poultrymeat which has successfully been reducing for several years. Nevertheless harmonised implementation across the EU is still a great challenge. Unfortunately the Commission did not anticipate that Member States would include supporting interventions in their national control programmes. The implementation by the Members States will be closely monitored by the experience of the **a.v.e.c**. members.

The evaluation of the hygiene legislation is still on-going. **a.v.e.c**. continuously works to avoid or prevent different interpretations and implementations across the EU, especially in respect of the definitions of meat preparations, meat products, and mechanically separated meat. As regards the review of poultry meat inspection, following the EFSA opinion on this subject, **a.v.e.c**. will strenuously press for further improvements.

a.v.e.c. is advocating the reintroduction of processed animal proteins in feed and had welcomed the efforts and the initial proposal of the European Commission. Unfortunately due to the different positions of the Member States the reintroduction will be done step by step. The use of processed poultry and pig protein in feed will be delayed because the discriminating PCR test is still not available.

The implementation of the broiler welfare directive is still on-going. All Member States have applied the maximum stocking density criterion, although with some variations. We need to determine the influence of these and other differences in implementation on the market. Outcome based welfare indicators are being discussed and are already applied in some Member States. The Commission is expected to present a report on the influence of breeding on the welfare of breeders and broilers by the end of the year possibly with proposals for regulation. Any such proposals must avoid imposing breed constraints that would undermine the structure and competitiveness of the European poultry industry.

The European poultry industry is preparing itself for the implementation of stricter requirements for the stunning of poultry from 1 January 2013. For the poultry industry the challenges include development of standard operation procedures, coping with damagingly high minimum electrical stunning currents, training of animal welfare officers and staff handling poultry, and additional monitoring. **a.v.e.c**. has contacted suppliers of equipment for their support with technical data for standard operating procedures and is closely following the developments.

On 19 January 2012 the Commission published its Communication on the EU Strategy for the Protection and Welfare of Animals 2012-2015. **a.v.e.c**. fully agrees with the conclusion that implementation and enforcement of the legal requirements throughout the EU needs better harmonization. This will ensure animal welfare and the transparency of the internal market. It is essential that consumers are better informed about the already high standards applied in the EU animal production and that they are ready to pay the price for better standards

Antimicrobial resistance is of growing concern. **a.v.e.c**. has set up a working group involving all steps of the poultry production chain and has developed an action plan to recommend the reduction of the use of antimicrobials in the chain.

In 2012 the European Poultry Industry Guide (EPIG) on the GMP and HACCP programs to reduce Salmonella at farm level has finally been published on the Commission DG SANCO website in all community languages. We are pleased to see this Guide developed by **a.v.e.c**. and COPA-COGECA now in place.

a.v.e.c. will continue to incorporate future challenges into its daily work while ensuring cooperation with the Commission and all our main stakeholders in Brussels.

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Berend Jan Odink
President

Cees Vermeeren
Secretary General


EU poultrymeat serving “consumers’ wellbeing”

a.v.e.c. – OUR ASSOCIATION

Who are we?

a.v.e.c. is a voluntary, non-profit association created in 1966. As a European unit **a.v.e.c.** represents and promotes the interests of the European poultry sector. Our members are national organisations representing poultry processors and the poultry trade in 17 EU countries. **a.v.e.c.**'s members represent 95% of the EU poultrymeat production.

a.v.e.c. influences the drafting of EU legislation, which has consequences for the industry and for EU consumers and strives to improve the established, strong cooperation with the different services of the European Commission and the Parliament. On December 1st 2009 the Lisbon treaty entered into force. With the Lisbon treaty the European Parliament has gained more influence (co-decision procedure) on a number of legislative proposals of interest to the poultry industry and **a.v.e.c.** keeps good relations with the changing Members of Parliament, a cooperation of key importance.

Objectives

The main objectives of **a.v.e.c.** 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 an umbrella organisation, we represent a strong and dynamic entity prepared to handle the present and future challenges of our industry.

Administrative structure

In January 2005 **a.v.e.c.**'s secretariat was established in Brussels. The office is managed by Cees Vermeeren, Secretary General.

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

The Presidency and the Board

Jan Odink, president of the Dutch poultry association NEPLUVI, was elected president of **a.v.e.c.** in 2010. The president leads the board meetings and the General Assembly and he assists the secretariat in its daily work whenever possible.

a.v.e.c. has four vice-presidents, Federico Felix from Propollo/AMACO, Spain, Paul Heinz Wesjohann of the German BVG, Bruno Veronesi from UNA, Italy, and Paul Lopez from FIA/CIDEF, France. The presidency and vice-presidency are up for election every two years and are renewable.

a.v.e.c.'s member organisations are represented in the Board by one Board Member and one Deputy Board Member. Board meetings are held four times a year. **a.v.e.c.** organises its annual reception in connection with the first board meeting to facilitate an exchange of views between board members, officials from the Commission, the Parliament and other stakeholders. Commission experts are invited to attend the board and working group meetings whenever their presence is considered opportune. The General Assembly takes place on a yearly basis, usually in September 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.

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WHO ARE OUR MEMBERS

a.v.e.c. represents the majority of poultry interests in the European Union. Our members are national organisations representing poultry companies, processors and slaughterhouses. In 2012 **a.v.e.c.** welcomed the Austrian Poultry Health Service (QGV-Österreichische Qualitätsgeflügelvereinigung) as member. Currently, we have 19 members from 17 EU Member States, representing approximately 95% of the European poultry meat production.

The members participate in the daily work of **a.v.e.c.** 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:

AUSTRIA
QGV - Austrian Poultry Health Service
Österreichische Qualitätsgeflügelvereinigung

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

CZECH REPUBLIC
Sdruzeni Drubezarskych Podniku

DENMARK
DSF – Dansk Slagtefjerkræ

FINLAND
Suomen Broileriteollisuusyhdistys

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

GERMANY
ZDG - Bundesverband der Geflügelschlachtereien e.V.

HUNGARY
BTT - Baromfi Termék Tanács

ITALY
UNA – Unione Nazionale dell'Avicoltura

NETHERLANDS
NEPLUVI – Vereniging van de Nederlandse Pluimveeverwerkende Industrie

POLAND
KRD - IG - Krajowa Rada Drobiarstwa - Izba Gospodarcza

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

ROMANIA
UCPR - Uniunea Crescatorilor de Pasari din Romania

SLOVENIA
GIZ - Mesne Industrije Slovenije

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

ProPollo

NEPLUVI

UNA

VIP - BELGIE

FIA

ETL

KRD

Izba Gospodarcza

ancave

Uniunea Crescătorilor de Păsări din România

UCPR

GIZ

Mesne industrije

BVG

Baromfi Termék Tanács

bpc

SVENSK

FÅGEL

QGV

ÖSTERREICHISCHE QUALITÄTSGEFLÜGELVEREINIGUNG

EU AND INTERNATIONAL KEY PARTNERS

a.v.e.c. cooperates with many other international organisations depending on the issues at stake. **a.v.e.c.** 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.

a.v.e.c. has valuable communication and cooperation with **COPA-COGECA**, the Committee of Professional Agricultural Organisations and General Confederation of Agricultural Cooperatives in the European Union. Together **a.v.e.c.** and **COPA-COGECA** have drafted some common positions and letters to the EU institutions and lately drafted a Community guide on good hygiene practice translated into all European Union languages that has been published at the DG SANCO website in April 2012.

Depending on the issues **a.v.e.c.** also builds alliances 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, **EUROCOMMERCE** association for retail, wholesale and international trade interests and **EFFAB**, European Forum of Farm Animal Breeders..

The **a.v.e.c.** office is 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 have shared the secretariat of **a.v.e.c.** In April 2008 the **EPB**, the European Poultry Breeders, also joined. This unique situation allows the European poultry sector to profit from the mutual sharing of knowledge on common poultry issues and strengthens our efforts to improve the global competitiveness.

a.v.e.c., 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 many countries and counts 24 member countries.

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, FAO, WHO and WTO.

IPC has through the agreement with the OIE taken active part in e.g. the work concerning:

- Private standards
- Animal health and welfareand
  and with Codex Alimentarius and FAO
- Public - private standards
- Campylobacter

Facts about the IPC :

- Founded on 7 October 2005
- President: Mr. James H. Sumner, USAPEEC
- 1. Vice-president: Mr. Tage Lysgaard ,(until March 2012) **a.v.e.c.**
- 2. Vice-president: Mr. Ricardo Santin, ABEF, Brazil
- Treasurer: Mr. Cesar de Anda, UNA, Mexico
- Members-at-large: **Peter Bradnock** (from March 2012) **BPC/a.v.e.c.**
  Dr. Mohamed El-Sharfei, EPPA, Egypt
  Wang Jinyou, CFNA, China
  Dr. Vivien Kite, ACMF, Australia
- Represents more than 80% of world broiler production and about 95% of world poultry trade.

Recent IPC Conferences

- *Sydney*, Australia, 2009
- *Paris*, France 2010
- *Santiago*, Chile, 2010
- *Rome,* Italy, 2011
- *Livingstone,* Zambia, 2011
- *Paris*, France 2012
- Salvador, Brazil, 2012

OIE – IPC agreement in May 2008 and FAO MoU April 2010

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 an observer in OIE and Dr. Vivien Kite and Dr. Thomas Janning are nominated as the IPC observers. They are participating actively in the development of animal welfare recommendations related to the broiler production systems. In April 2010 a memorandum of understanding was signed by FAO and IPC during the IPC spring meeting in Paris. IPC got the status as an observer in the Codex Alimentarius. Cees Vermeeren and Mark Lobstein have been nominated as observers and they follow up the relevant issues in the Codex committees, especially on food hygiene and food labelling. During the IPC Meeting in March 2012, Peter Bradnock was elected in the executive committee of the IPC, replacing the founding father, Tage Lysgaard. A ceremony recognising the commitment of Tage Lysgaard was organised during the March meeting.

a.v.e.c. FOCUS

This section gives an overview of the main themes **a.v.e.c.** is working within 2011-2012. You will find a more general description of the issues at stake combined with a brief outline of **a.v.e.c.'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:

www.avec-poultry.eu

EU POULTRY MEAT SERVING CONSUMERS "WELLBEING"[1]

European consumers are increasingly looking for healthy lifestyles that implies eating healthy meals that have little fat content and good nutritional value proteins. Consumers also say they care for animal welfare. Poultry is well placed to meet these demands and add to consumer wellbeing:

Firstly, European poultry meat complies with strict European legislation for food safety, animal health, welfare and environmental standards. EFSA reports show that producers are successful in combating Salmonella, but that the big challenge to reduce the prevalence of Campylobacter remains.

Secondly, poultry is mild coloured and tasting, has an excellent texture and capacity to be easily transformed into various products. Spices may be added according to taste and then it becomes a tasty Indian, Chinese or Hungarian speciality. Poultry meat may be consumed in entrees, as soups or salads, as whole or cut meat, in sausages, as nuggets, kievs or other meat preparations, and can be cooked, roasted, boiled, fermented or grilled.

Thirdly, unlike other meats, chicken meat carries no religious restrictions and can be eaten by those of any religion. Along with its universal religious acceptance, its leading affordability among the four main animal proteins contributes to its continuing popularity and has been a key factor in boosting its consumption around the world.

Finally, poultry meat is considered a main source of proteins in both developed and less developed nations and has the advantage that it can be converted into both an affordable meal and directly benefit the 'wellbeing' of the consumer.

The EU could gain from the global increase in demand for poultry meat in the near future. The good value and healthy meat image is expected to promote domestic demand.

Since 2010, legal conditions have been in force for the protection of chickens kept for meat production. **a.v.e.c.** is following their implementation across the EU. Some Member States have used the national competence provision to introduce stricter rules in their territory, especially as regards the monitoring of the welfare of chickens by outcome indicators. By this and other activities, the poultry industry is working on further enhancement of the welfare of chickens. It is hoped that the media publicity on the banning of 'battery' cages for laying hens from January 2012, will have helped inform EU citizens that chickens reared for meat are not kept in cages.

Meat producing chickens are efficient protein producers with relatively low environmental impact

By 2050, an expanded world population will be consuming two-thirds more animal protein than it does today, bringing new strains on the planet's resources, says the Food and Agriculture Organization (FAO) Report.

Poultry are very efficient converters of vegetable protein into live weight compared to ruminants and other mammalian livestock. While cattle need some 5 kg of feed to produce 1 kg of meat and a pigs some 3 kg, chickens eat less than 2 kg, in fact 1.7 kg, to achieve the same 1 kg of live weight. Additionally, according to the World Bank World Development Report 2011, producing 1 kg of chicken meat requires, in total, 3 900 litres of water, while for pork the volume is 4 800 litres and for beef 15 500 litres.

[1] The source of the figures and positions used in this section are DG AGRI, the European Commission, FAO, OECD, FAPRI, USDA, publications of consultants and specialized magazines.Please see the references at the end of this section.

Population and income growth are increasing the consumption of animal proteins in general, and especially in developing countries. Some commentators are estimating that this might lead to a 73% increase on current levels by 2050. Therefore it is crucial that food particularly meat is produced as efficiently and sustainably as possible. As the World Livestock FAO Report 2011 confirmed, 'there are no technically or economically viable alternatives to intensive production for providing the bulk of the livestock food supply for growing cities'

Consumers' wellbeing can be well served by consuming poultry meat - not only in terms of eating healthily but also as a mitigating response to increasing concern over climate change and animal health and welfare.

GLOBAL PICTURE OF THE POULTRYMEAT SECTOR (2011, 2012, 2020) (Source: Data extracted on 23 Apr 2012 1 from OECD.Stat)

Production (ktons)

Poultry meat (rtc)	2011	2012	2020
World	100 114.63	102 202.36	122 410.82
European Union-27	11 923.69	12 041.33	12 631.88
United States	19 494.88	19 875.25	22 870.19
Russia	3 144.89	3 291.64	3 810.57
Ukraine	822.43	861.21	1 259.52
Argentina	1 711.20	1 793.05	2 390.84
Brazil	12 845.63	12 901.92	14 955.40
China	16 940.29	17 161.12	20 849.07
India	2 827.24	2 987.00	4 257.63

Imports (ktons)

Poultry meat (rtc)	2011	2012	2020
World	10 596.52	10 645.46	12 512.95
European Union-27	793.13	756.96	883.42
United States	51.71	48.99	48.99
Russia	350	299.81	102.19
Ukraine	282.31	279.48	264.34
Argentina	22.41	22.41	22.41
Brazil	0.64	0.51	0.39
China	601.42	589.75	671.33
India	0.13	0.13	0.14

Exports (ktons)

Poultry meat (rtc)	2011	2012	2020
World	10 610.27	10 659.21	12 526.71
European Union-27	987.47	1 000.49	898.26
United States	3 179.41	3 208.63	3 702.39
Russia	8	8	225
Ukraine	15.53	15.56	15.74
Argentina	336.37	368.29	561.22
Brazil	3 426.11	3 346.05	4 136.17
China	526.49	539.11	599.4
India	5.18	5.21	4.98

Consumption (ktons)

Poultry meat (rtc)	2011	2012	2020
World	100 135.18	102 173.60	122 489.21
European Union-27	11 736.35	11 797.80	12 708.62
United States	16 394.77	16 706.48	19 222.36
Russia	3 484.63	3 582.90	3 687.07
Ukraine	1 089.21	1 125.13	1 508.11
Argentina	1 397.23	1 447.17	1 852.02
Brazil	9 420.16	9 556.38	10 819.62
China	17 015.22	17 211.76	20 921.01
India	2 822.19	2 981.92	4 252.78

References:

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- FAPRI-ISU 2011 World Agricultural Outlook, published in April 2011, http://www.fapri.iastate.edu/outlook/2011
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- http://www.worldpoultry.net/processing/meat/marketing/chicken-meat-a-promising-future-ahead-9277.html by Fabio G. Nunes
- http://www.wattagnet.com/Intensive_livestock_production_key_to_handling_future_demand.html
- EFSA's reporting on Salmonella in broilers and turkeys:
- http://www.efsa.europa.eu/en/efsajournal/pub/2597.htm
- http://www.efsa.europa.eu/en/efsajournal/pub/2616.htm

Appropriate use of antimicrobials

Antimicrobial resistance in bacteria is a great challenge to society and the European poultry industry is keen to show how seriously all partners in the chain including advisors and veterinarians are acting while keeping animals healthy.

“Appropriate use of antimicrobials is the key to mitigating the risk of widespread antimicrobial resistance”.

Antimicrobial resistance in bacteria and other mechanisms of resistance are a natural phenomenon. It has existed prior to the use of antimicrobials by humans. Particular strains or species of bacteria are naturally resistant to certain antimicrobials and therefore antimicrobial resistance can exist prior to administration of antimicrobial products. However, most discussions focus on resistance which occurs after exposure of the bacteria to the antimicrobial. This is an inherent risk associated with any use of antimicrobial medication in any species but adherence to appropriate procedures for use will significantly reduce the risk.

a.v.e.c. has drawn up a common position on prevention and responsible use of antibiotics.

The EU poultry industries have defined a 4 point action plan with 8 recommendations to ensure prudent use of antimicrobials in the whole poultry production chain. Through monitoring and collection of data, target setting for reduction of the use of antimicrobials and performance benchmarking, responsible use of antimicrobials can be confirmed.

a.v.e.c. and European Poultry Breeders (EPB) Group has agreed to follow specific recommendations on flock biosecurity; the farmer/veterinarian relationship; carrying out antibiograms; distribution, cascade use, sampling, testing and monitoring of antimicrobial resistance; record keeping by farmer and veterinarian; and to review use of certain antimicrobials.

a.v.e.c. recognizes the need for alternatives to antibiotics. More work is needed to understand the science behind antimicrobial resistance in humans and animals and the extent of any interrelationships. The industry continues to cooperate with research institutes and the EU authorities, to solve this difficult and complex issue, and to identify and reduce potential future AMR challenges.

Commission Animal Welfare Strategy 2012-2015

Current conventional poultry production in the EU meets the strictest criteria in the world in terms of food safety, animal health and welfare and sustainable production and this must be recognized by regulators and consumers. We must guard against introduction of additional mandatory criteria that would weaken the competitiveness of EU poultry production by imposing additional costs that hamper the industries' ability to continue to improve resource efficiency. **a.v.e.c**. welcomes the Animal Welfare Communication and agrees that harmonized enforcement of existing welfare legislation is needed to avoid internal market distortions and that this must extend to full reciprocity on welfare and other regulations in bilateral and multilateral negotiations.

The following main common drivers affecting the welfare status of animals in the EU are: lack of enforcement of EU legislation by the Member States in a number of areas; consumers' lack of appropriate information on animal welfare; and the need for simplified legislation based on clear principles for animal welfare.

COMMISSION ANIMAL WELFARE STRATEGY 2012-2015

In **a.v.e.c.'s** experience the harmonised interpretation and implementation of EU legislation is a real challenge and therefore we strongly support the Commission Communication findings.
In its dialogue with consumers, the Commission must stress the already high standards applied in the EU animal production and prepare consumers for the higher costs of better standards.

Regulation 1099/2009 on the protection of animals at time of killing
The implementation of Reg. 1099/2009 will start from 1 Jan 2013. Food business operators have to draw up and implement standard operating procedures to ensure that killing and related operations are carried out according to the requirements. **a.v.e.c.** members are committed and have already started the important work with manufacturers of stunning equipment.

The Commission is required to submit to the European Parliament and Council a report on the various stunning methods for poultry and in particular multiple-bird water-bath stunning taking into account welfare, socio-economic, and environmental impacts. A private consultancy company has already started drafting the external study. **a.v.e.c.** members are proactive and are collaborating by providing information on the questions being addressed.

Requests by UK and The Netherlands to change the stated electrical frequency range are currently being considered by EFSA. An opinion is expected in months to come.

Stunning for religious slaughter is a complicated issue. There are disagreements even within different Muslim communities about the stunning of poultry under Halal slaughter. For **a.v.e.c.** it is important that, whatever method of slaughter is adopted the welfare of the bird is protected and that for all meat, whether imported or from within the EU, the same rules are applied to avoid distortion of competition. The possible derogation for religious slaughter must not be a loophole that may seriously undermine the objectives of the EU regulation or the common market, both within the EU (through different application by different Member States) and with Third Countries.

Cloning
The Commission is expected to propose new rules regulating cloning in the animal breeding sector in March 2013. In framing its proposals the Commission will have in mind the need to avoid the same lack of Member State support that caused the collapse of the Novel Food legislation March 2011.
An updated opinion by the EU's food safety authority EFSA is expected in June 2012, while an overall Commission impact assessment is expected by the end of 2012.
No EU application has been submitted so far on cloning animals for food purposes but the growth of the use of cloning techniques outside the EU-27 has raised doubts about EU imports with regards to other livestock species. **a.v.e.c.** is actively following the developments, but today cloning in poultry is not considered as an opportunity.

Protection of animals during transport
The Parliament adopted a declaration in March 2012 demanding a maximum 8-hour limit for the transport of live animals to slaughter.
a.v.e.c. welcomes that the Commission in its Communication states that enforcement of current legislation on transport Regulation 1/2005 has to be implemented before stricter rules are set and is willing to cooperate for harmonizing existing rules at EU level. **a.v.e.c.** has contributed to this by drafting the EPB Air Cargo Guide To Transport Of Hatching Eggs And Chicks[2], intended to advise on best practice in transport.

Implementation of the Broiler Welfare Directive 43/2007
After entering into force on 30 June 2010, information collected by **a.v.e.c.** from members confirms that most Member States are following the Directive, with some imposing additional or more restrictive requirements, mainly on stocking density.
The Commission has started to collect data for a period of 12 months on implementation. Certain Member States have agreed to provide details on the use of indicators of welfare outcomes in assessing animal welfare. By the end of 2012 a report on the use of welfare indicators is to be published by the European Commission. **a.v.e.c.** members are providing input in this process.

[2] http://www.avec-poultry.eu/Default.aspx?ID=6712
http://webwizard.register.be/page.asp?p=wizard_2&id=797946&key=d41d8cd98f00b204e9800998ecf8427eC2CFA

FOOD AND FEED SAFETY

For the European poultry processors food safety is of paramount importance. It is their core responsibility to demonstrate every day to consumers that they are delivering safe food. **a.v.e.c.** supports their efforts and commitment by an active attitude in relation to the European Commission as regards producing safe food to the highest European standards. The successful reduction of Salmonella prevalence in poultry meat is a good example of our sector's commitment.

Implementation of the Salmonella criterion

The Reg. 1086/2011 amending Annex II to Reg. 2160/2003 and Reg. 2073/2005 as regards Salmonella in fresh poultry meat has applied since 1 Dec. 2011. From this date Salmonella enteritidis and Salmonella typhimurium have to be absent in a 25g sample of fresh meat neck skin. **a.v.e.c.** is monitoring closely the implementation in the Member States and is following the experiences of its members.

The European Food Safety Authority (EFSA) and the European Centre for Disease Prevention and Control (ECDC) have published their annual report on zoonoses and food-borne outbreaks in the EU for 2010. Salmonella cases in humans in the EU fell by almost 9% in 2010, marking a decrease for the sixth consecutive year. It is confirmed that positive progress in the reduction of Salmonella cases in humans and poultry is continuing and the majority of Member States meet the EU targets set. **a.v.e.c.** is wholly supportive of the initiatives set by the EFSA and ECDC and their commitment to continue to strengthen their links with all important partners and foster collaboration in order to decrease the occurrence of these diseases in the EU.

Campylobacteriosis

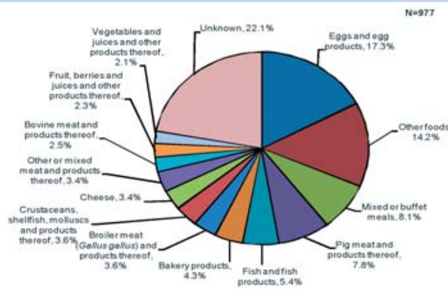
Consumers have a preference for fresh poultry meat. In its April 2012 Opinion, EFSA suggested certain interventions that would reduce substantially the presence of Campylobacter, such as irradiation with 100 % reduction, freezing the meat for 2-3 weeks giving a reduction up to 90% or using hot water or chemical decontamination resulting into a reduction of 50-90%. However, these measures are not really a feasible option since these measures will affect the freshness and appearance of the product as perceived by consumers or consumers are totally against the use of some of the treatments.

In addition to good biosecurity on farms and good hygiene in processing plants, it would be beneficial if we could succeed to decrease the number of Campylobacter organisms present to a level that substantially reduces the risk for human health.

At the retail level the possibilities of novel packaging material and modified atmosphere packaging should be studied further. Safe consumer handling of meat can avoid later contamination.

a.v.e.c. members are actively involved in projects in their countries and we remain committed to continue to work on the reduction of the Campylobacter prevalence in the poultry chain. However, interventions cannot deny consumers' preferences and demand.

EFSA has adopted an opinion on microbiological risk assessment of Campylobacter in broiler meat in April 2011 . As a follow-up, the Commission launched a cost-benefit analysis of the control measures for Campylobacter on different stages of the food chain. This will be available in the second half of 2012 and will complement the EFSA opinion with economic figures/data on the most important control options. The outcome of this cost-benefit analysis and EFSA's opinion will be food for reflection and discussion on the most appropriate risk management measures.



Food-borne outbreaks in EU, 2009 (Source: EFSA)

Review of Hygiene Package (Reg.852/2004; Reg.853/2004; Reg.854/2004)

After the publication of the Commission Report COM (2009)403, the analysis of the Impact Assessment conducted in 2011 has been finalised.

As regards **Meat Inspection**, there is a strong need for a tool to adapt meat inspection to the local or national situation on zoonosis and animal diseases.

The EFSA Report suggests a modernisation of poultry meat inspection and an improved use of shared information between farms and abattoirs (food chain information), which would also help to identify animal health and welfare issues.

a.v.e.c. welcomes the findings on modernisation of meat inspection and looks forward to bring its contribution to the sensitive findings of the report.

For **meat products and meat preparations**, a harmonized interpretation at EU level is essential to avoid unfair competition and trade problems linked to Reg. 1234/2007 and Reg. 853/2004. In our opinion it has never been disputed that a meat that has been pickled or heated on the outside only (e.g. flash-fried, steamed) but internally still has the characteristics of fresh meat is a poultrymeat preparation since it does not comply with the last part of the definition of a meat product saying 'so that the cut surface shows that the product no longer has the characteristics of fresh meat'.

Mechanically Separated Meat (MSM)

Across the EU, a different interpretation of MSM among Member States can cause unfair competition and trade barriers. Today, for a product to be qualified as MSM it must meet the 3 conditions:

1. It must be obtained by removing meat from flesh-bearing bones after boning
2. It must be obtained by the use of mechanical means
3. Those mechanical means must result in the loss or modification of the muscle fibre structure.

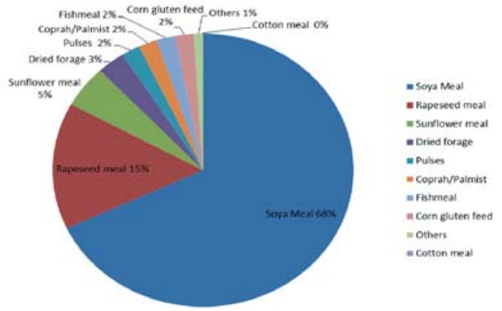
The new definition of MSM that is likely to be proposed by the Commission will have to consider the technological progress in the field of separating meat from bones. Nowadays some mechanized processes of separating meat and bones deliver a product with the microscopic characteristics that are not different from products that qualify as meat. **a.v.e.c.** looks forward to seeing the classification of this product under the new definition which will include the soft separated meat in the meat content and avoid additional labelling issues.

Processed animal proteins (PAPs)

a.v.e.c. welcomes the reintroduction of PAPs into fish feed but would have liked the necessary methods to be available so valuable poultry and pig protein could be included in monogastric feeds while respecting the intra-species recycling ban.

Discussions on this sensitive dossier are on-going, fuelled by the high animal feed prices that have a strong impact on competitiveness of the EU poultry industry further driven by the current appreciation of the currencies of countries exporting soy to the EU. The Dutch Ministry of Economic Affairs, Agriculture and Innovation requested a cost-benefit analysis of reintroduction of PAPs in diets for poultry and pigs in a completely separately-channelled production system. The researcher extrapolated from the Dutch situation that in Europe 3.353 kton soybean meal could be substituted by 2.739 kton PAPs based on feeding value and common inclusion levels in compound feed for poultry and pigs. Due to the species-to-species ban 1.252 kton processed animal protein originating from pigs would be available for poultry feed and 1.487 kton processed animal protein originating from poultry could be used in pig feed. But a tolerance level with regard to the species-to-species ban should be accepted since a zero tolerance policy is difficult for the small and medium feed compounders because of costs and logistics.

Protein sources used in the compound feed in EU-27(in % of all protein used)



Source: T. Veldkamp, March 2012 ((total protein from EU and imported FEFAC, 2009))

Cloning for food production consultation

The Commission has started a Consultation on animal cloning for food production. It does not cover other purposes like research, production of pharmaceuticals or the conservation of endangered species or breeds. The collected information will be used as part of an impact assessment in order to propose in 2013 legislation for adoption. Cloning is not applied in poultry production but for potential research purposes the option should be retained.

Genetically Modified Organisms (GMOs)

The Council discussed, on the basis of a compromise text from the Presidency, the Proposal for a regulation amending Directive 2001/18/EC as regards the possibility for Member States to restrict or prohibit in all or part of their territory the cultivation of GMOs that have been authorised at EU level. The aim was to provide a legal basis in the related EU legal framework to grant competence to Member States to restrict or prohibit on grounds other than health and environment considerations since these aspects have already been addressed during the EU authorisation process for GMOs.

The compromise Proposal was rejected in the March 2012 Council by 10 Member States that have invoked the safeguard clause, as an argument against the introduction of GMOs[iii] .

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EFSA Journal 2011;9(4):2105 (http://www.efsa.europa.eu/en/efsajournal/pub/2105.htm).
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MARKETING STANDARDS – LABELING OF POULTRYMEAT

Reg. 543/2008 implements the marketing standards for poultry as laid down in the Reg. 1234/2007. **a.v.e.c.** has studied the existing marketing standards for poultrymeat and has drafted amendments to be presented to the European Commission in the second half of 2012. The suggestions regard especially the definitions, the chilling methods, the origin labelling and the requirements, registration and record keeping of different types of farming.

UN-ECE Standards

UNECE's (United Nations Economic Commission for Europe) major aim is to promote pan-European economic integration. UNECE located in Geneva is one of the 5 regional commissions of the UN Geneva. Its mandate is to provide analysis, policy advice and assistance to governments and to develop norms, standards and conventions to increase international cooperation within and outside the UNECE region.

The areas of work are economic cooperation and integration, energy, environment, sustainable land management, gender, population, statistics, transport and trade. To facilitate international trade global agricultural quality standards are developed. UNECE is the only regional commission with a mandate in agricultural quality standards. For poultry, international standards have been published for chicken meat (2007), duck meat (2008), turkey meat (2010) and goose meat (2011) .

In April 2012 a bureau and rapporteurs' meeting was organized to discuss the existing standards and a possible extension of the scope by including further processed products following a request from the USDA[2]. The conclusion was that it was not advisable to extend the scope of the existing standard, but to develop a separate standard for prepared and processed products. The scope of the future standard has been defined. It will be presented to the Specialized Section on Standardization of Meat in September for assessment and a decision to present it to the Working Party on agricultural quality standards in November 2012. Once the working party has adopted this, the process of developing the standard will start. The work will focus on the definitions of the products to be included and other relevant quality aspects.

Food information to consumers

The final Reg. 1169/2011 on the "provision of food information to consumers" was published in the official journal on 11 November 2011. DG AGRI has the lead on the origin labelling of article 26(b) for meat and is conducting the Impact Assessment on country of origin labelling in consultation with stakeholders. This has to be concluded with the adoption of implementing acts by 13 December 2013. Later DG SANCO will decide on the origin labelling of meat as an ingredient and processed products. **a.v.e.c.** is involved in the process and has regular contacts with the DG AGRI Section, in charge of the Impact Assessment for poultry meat.

a.v.e.c. position on labelling of origin

Consumers want to be informed about the origin of the poultry meat they eat. a.v.e.c. understands consumer demands as we are all consumers. We have however doubts about the added value of too much information. Information must always be clear and easy to understand.

a.v.e.c. is advocating mandatory labelling indicating the place of farming by the mandatory indication of "EU" followed by the name of the Member State, or mandatory indication "non EU" followed by the name of the country. This should apply to unprocessed poultry meat and to poultry meat preparations and products containing 25% or more poultry meat in all stages until the consumer.

In brief, until the consumer all products containing 25% or more poultry meat should be mandatory labelled with the place of farming indicating "EU" plus the name of the Member State or "non EU" plus the name of the third country.

Other issues at stake and to which **a.v.e.c.** is paying attention in the upcoming Regulation are the 'use by', 'best before' and freezing date, the definitions of minced meat, meat preparations and meat products and mechanically separated meat. In the preamble of the regulation is suggested that a study on the opportunity to provide the consumer with information on the stunning of animals at slaughter should be considered in the context of a future EU strategy for the protection and welfare of animals.

Eco-label initiative for food products?

DG ENVI conducted in early 2012 a consultation on "delivering more sustainable consumption and production". **a.v.e.c.** is in general against an eco-label for food since it is more likely to create confusion in the mind of consumers and bring unfair competition especially if it would be allowed only for some food products e.g. organic, fish, bread.

However, if an eco-label should be introduced, it is important that scientifically proven and harmonised assessment criteria are developed and applied on equal terms for all products concerned by the eco-label to avoid any unjustified discrimination.
Furthermore to avoid unfair global competition, the criteria should be recognised and applied by WTO.

a.v.e.c. is promoting more education of consumers, preferably from when they are very young, to understand the significance of the choices they make for emotional, nutritional and rational reasons. Improved information may create a better understanding and promote a better informed final purchasing choice.

Common Agricultural Policy (CAP) Proposals

In October 2011, the European Commission published proposals for the reform of the CAP. In 2012 the Commission has been conducting debates with the Council and Parliament to find an agreement for adoption of the reform by the end of 2013.

a.v.e.c. has studied the results of the Impact Assessment as published by DG AGRI. The assessment shows very negative and worrying effects for the EU poultry sector if the Proposal were to be implemented as it is today. a.v.e.c. concerns arising from the greening measures imposed on arable farms adversely and disproportionately affecting EU poultry producers; they have been communicated through a detailed letter submitted to Commissioner Ciolos in January and February 2012. **a.v.e.c.** shall continue to follow closely the on-going discussions.

References:

Regulation 1169/2011on the food information to consumers:
http://eur-lex.europa.eu/Result.do?T1=V1&T2=2011&T3=1169&RechType=RECH_naturel&Submit=Search
The different UN-ECE standards may be acceded by:
1. http://www.unece.org/trade/agr/standard/meat/meat_e.html
2. http://www.unece.org/index.php?id=29707)

Market situation of turkeys

Turkey production in the EU is concentrated in a few Member States. Since 2009, five countries (Germany, France, Italy, the UK and Poland) produced more than 85% of all EU turkey meat. Only a small number of companies in a limited number of Member States are involved in the turkey primary breeding sector. Also the consumption of turkey meat varies strongly between Member States, with the percentage of consumers ranging from 0.2% to 70%.

The present situation as regards the price of raw materials and energy costs in EU has fluctuated in the last 12 months and has forced prices of turkey meat to go up. The decrease in turkey meat consumption is explained by these constraints. When prices continue to accelerate the consumption decreases.
The EU turkey production remains stable with an estimated 1.8 mil tons. No change in the production repartition in the EU is expected contrary to what has happened in previous years. The imports of turkey meat into the EU have decreased with 18% compared to previous year with Brazil as the main importing source.

New criterion in place for Salmonella and EFSA Scientific Opinion

From 31 December 2012 onwards the criterion for the absence of Salmonella entritidis and Salmonella typhimurium in 25g of turkey meat of Regulation 2160/2003, article 4 enters into force. Regulation 584/2008 establishes the objective reducing Salmonella prevalence in turkey flocks to 1% also by 31 December 2012.

In May 2012 EFSA published its report evaluating the possible impact on public health of reducing Salmonella levels in turkeys across the EU. The Panel found that the dominant serovars are Salmonella Enteritidis, Typhimurium, Kentucky, Newport, Virchow and Saintpaul.

Projecting a possible scenario (reduction of S.E. and S.T. of 1%) a reduction of 0.4% in percentage of turkey transmitted salmonellosis could be achieved but when adjusting the combined prevalence of all serotypes to 1%, a 83.3% reduction equivalent to 2.2% of all human salmonellosis could be expected.

The report concludes that vertical transmission of Salmonella and hatchery acquired Salmonella contamination from breeding stock are important sources and the control in breeding but also during rearing is important.

Welfare of Turkey

a.v.e.c. agrees that good farming practice and farm management are vital for turkey health and welfare. Turkeys are like other animals sentient beings and must be treated with respect.
The welfare of animals is important to society. Turkeys like other animals kept for meat production are kept in houses where the biological needs of the turkeys are taken care of: appropriate nutrition, freedom of movement, physical comfort and the need to perform natural behaviour. The turkeys are protected against adverse climatic conditions, injury, fear and disease. Progress or advance in feed, housing, equipment, medicines and genetic research are taken into account to improve the conditions during rearing.

To respond to these demands **a.v.e.c.** has in 2011 and 2012 set up a working group with the aim to develop the **a.v.e.c.** Turkey Welfare Guide. After one year of work the draft guide is almost ready for final approval by the board of **a.v.e.c.** The guide covers all aspects of turkey rearing at farm level.

TRADE NEGOTIATIONS 2011-2012

There have been two major events in spring 2012 that have focussed the attention of the poultry industry on trade. The first has been the decision of the EU to lift the ban on imports for fresh Thai poultry after EU Member States agreed that the ban imposed in 2004 at the height of Avian Influenza concerns is no longer justified. The European Commission has officially recognised Thai efforts to eradicate the highly contagious pathogen, which spread from South East Asia in mid-2003 and affected more than 60 countries, including some in Europe. The second major event was the publication of the decision of the European Council on the Agreement between EU and Brazil and Thailand respectively pursuant to Article 28 of the General Agreement on Tariffs and Trade (GATT) 1994. This relates to the modification of concessions with respect to processed poultry meat provided for in the EU Schedule annexed to GATT 1994.

WTO- DOHA moving forward?

The negotiations for a new WTO agreement are in a firm stalemate. It looks like agriculture is no longer being blamed for this since in the other areas, such as NAMA (non agricultural market access), environmental goods and services, the different positions could not be bridged either. The outlook for future progress is not positive with the elections in the US coming closer and the on-going economic crises. This is demonstrated also by the increased activity on bilateral negotiations.

The GATT Art.28 negotiations on harmonisation of the import duties for poultry falling in CN code 1602 were concluded on 23 April 2012 (see text above) .

WTO dispute settlements

India's ban on US poultry imports dispute

The US has approached WTO after its talks with India failed to resolve the dispute between the two countries. US claims that India's ban on US poultry imports due to avian flu fears is not scientifically justified. The move by the US to seek consultations with India over the trade is the first step in the dispute settlement process. India argues that its measures are aimed at preventing entry of avian influenza, but US officials argue that the measures are inconsistent with the relevant science, international guidelines, and the standards India has set for its own domestic industry. This case may interest also producers and officials in the EU.

Argentinian protectionist measures

The EU has launched an offensive against Argentina's import restrictions at the WTO in June 2012. The EU has requested consultations with Argentina to lift its restrictive trade practices that include a pre-approval system applicable to all products since Feb 2012, a non-automatic import licensing regime and the obligation of companies to balance imports with exports. The impact is not that much on the EU agricultural side since EU is not a big exporter to Argentina but it may impact further the Mercosur talks.

EU-US litigation PRT poultrymeat

a.v.e.c. has followed the discussions regarding the EU's restriction on imports of U.S. poultry treated with pathogen reduction treatments (PRTs) but in 2011 no further actions were registered.

Mexico and Canada

Mexico and Canada filed in April counter appeals with the WTO in the on-going dispute with the US over mandatory country-of-origin labelling. The US may have to stop requiring retailers to display country of origin labels on meat after losing the bulk of its appeal 29 June 2012 .

US-China

The WTO Dispute Settlement Body has set up a panel to probe US claims that Chinese anti-dumping and countervailing duties on US broiler imports flout WTO rules.

Beijing has argued the necessity of the duties claiming that US poultry product producers are benefitting from unfair subsidies, which allow them to undercut products on the Chinese market.

The move may also have been prompted by complaints from Chinese authorities that the US was breaching international trade rules by holding up imports of Chinese poultry products. A WTO panel was set up in July 2009 to look into Chinese complaints over the US Omnibus Appropriations Act of 2009, which contains a section prohibiting any funds being used to process imports of poultry products from China .

Brazil versus South African poultry duties

Brazil has addressed the WTO concerning the imposed provisional anti-dumping duties imposed by South Africa on Brazilian poultry products on the grounds that these imports were causing harm to the industry in the South African Customs Union. All whole frozen chickens coming from Brazil are being subject to an additional 63% duty, while additional duties ranging from 6 to 47% were imposed on boneless cuts . The first stage of the dispute settlement dispute, the consultation, was on-going in July 2012.

REGIONAL AND BILATERAL TRADE REGIONS AND NEGOTIATIONS

In general poultry is a sensitive sector. It is important that poultry meat quota offered and agreed in a bilateral trade agreement are included in any WTO quota and Mercosur trade agreement. **a.v.e.c.**'s concern is that a point might be reached where the EU has agreed to dozens of FTAs, each with relatively small TRQs for poultry, but which add up to a very substantial amount of poultry meat that can be imported in to the EU at very low, if any, custom rates. Moreover, the quota should not be aggregated, but should be equally divided over quotas for boneless cuts, cuts with bone in and poultry carcasses.

a.v.e.c. is strongly advocating for a 'single pocket' approach to TRQs as regards poultry meat and products.

ANDEAN (COLOMBIA, PERU) and CENTRAL AMERICA

Negotiators from the EU, Colombia and Peru have signed a comprehensive trade agreement, paving the way for the formal signing and ratification of the accord. The agreement should enter into force by the end of 2012. Based on the principle of regional integration, the deal remains open for signature by Ecuador and Bolivia, the other two members of the Andean Community.

MERCOSUR

According to the announcement made in July 2012 Mercosur will see Venezuela join as a full member by July 2012 and current member Paraguay has been temporarily suspended from the Mercosur grouping.

The European Commission finalised assessments of the possible impacts of an EU trade deal with the Mercosur bloc and concluded that the EU agri-food producers would face significant income losses, with estimates varying between 4.6 billion and 7.75bn according to different scenarios. The total loss to the meat sector under this scenario is over 5.8bn, of which 0.8bn falls under the poultry sector . The EU has committed to exchange market access proposals with the Mercosur trade bloc under Brazil's chairmanship of talks in July 2012 but it has been postponed. SPS and animal welfare issues have to be discussed.

For Brazil, poultry is the second most important issue. **a.v.e.c.** mentioned that not only the quotas but also their management is important, especially since some American companies in the poultry sector have a base both in the EU and Mercosur area. The single pocket approach will be used.

a.v.e.c. is following the negotiations closely.

ASEAN AND ASEM and bilateral talks

China

As regards future developments between EU-China so far the Chinese government has shown prudence in moving forward. China wants to be eligible to export heat treated poultry products from the provinces of Fujian and Henan. The FVO visited the provinces in October 2011 and found that overall the animal health controls systems are in place but that the officials must ensure rigorous official controls, traceability and adequate heat treatment. Shortcomings were also noted in the area of disease surveillance, control and notification (Avian influenza, Newcastle disease). Finally there is a lack of equivalency in the accompanying certification. China will be asked to address this before the provinces can be approved for export .

South Korea

In the first months of 2011, the EU and South Korea completed all the procedures necessary for provisional application of the FTA as of 1 July 2011. The implementation phase of the FTA is now on-going to ensure that the mechanisms used are efficient and effective in providing market access for EU businesses in South Korea and Korean businesses in the EU. The EU has offensive agricultural interests and a positive trade balance with Korea (spirits, pork meat, gluten, starch). In December 2011, the first meeting of the FTA Customs Committee took place.

Singapore

Both parties are trying to conclude the negotiations by end of 2012. EU negotiators are in dialogue now with Singapore officials and a political deal could be reached perhaps in summer this year.

India

Negotiations between the EU and India for an FTA are on-going with the aim of establishing the largest trade pact in the world. India's agricultural sector has shown some strong resistance to the talks, citing concerns over a negative impact on rural employment from an influx of EU dairy products. An SPS issue exists in the case of poultry since India is not following the OIE rules on eg. avian influenza restrictions.

As regards animal welfare standards the Indian negotiators are showing no interest in observing these in the negotiations. The EU has very offensives interest in agricultural good including processed agricultural products.

Thailand

With Thailand a long informal contact took place and now EU is hoping that concrete discussions shall be started soon. The EU is in negotiations with Thailand on an upgraded Partnership and Cooperation Agreement (PCA) which will extend the areas of cooperation. The exports of fresh poultry meat to the EU have been resumed from 1 July 2012 as detailed above in the introductory section.

Malaysia

Negotiations on an FTA are on-going with the aim to conclude them by end of 2012.

Next round of discussions was scheduled for June 2012 but has been postponed to September.

Indonesia

Since 2011 no progress on the scoping exercise FTA has been made.

Vietnam

The EU and Vietnam will begin official talks towards an FTA after having completed preparatory discussion. First round of talks is planned after the 2012 summer break. Vietnam's exports to the EU are mainly in the clothing and textile sectors, but food products include coffee and seafood. The majority of EU exports to Vietnam have been high-tech products including vehicles and electrical equipment.

Japan

Both parties have committed in 2012 to start the discussions for an FTA The EU poultry industry will face strong competition from Brazil, and likely Thailand and China will have an interest in exporting poultry meat to Japan while USA has already signed an FTA with Japan. Japan is the second most important trade partner in ASIA and a possible FTA will boost the EU economy.

OTHER BILATERAL NEGOTIATIONS

Canada

Both parties are committed in the negotiations and the agreement aims to be both ambitious and comprehensive. Meanwhile European Parliamentarians are backing the steps forward for an Agreement but highlighting the need to comply with EU rules on genetically modified crops, milk, and origin labelling.

Russian Federation

Once Russia has officially joined the WTO, expected in July 2012, developing countries will enjoy lower duties and increased consumer demand boosting their food exports, a study by the International Centre for Trade and Sustainable Development claims. Once in the WTO, Russia must adjust its trade rules in line with its WTO commitments or it would be possible for a case to be taken to the WTO dispute mechanism.

In the framework of the WTO accession the quotas agreed for poultry meat are: 100.000 tons for MSM tariff code, of which 80.000 tons is for the EU, and 250.000 tons of poultry legs erga omnes. This quota will be adopted in the mid-summer WTO meeting.

Russia wants to export poultry meat to the EU. **a.v.e.c.** has reminded the European Commission that the latest FVO inspection report states that the Russian official controls for poultry meat intended for export to the EU are not able to fully deliver the guarantees required in the relevant export certificate.

Ukraine

EU and Ukraine negotiators have finalised the text of an association agreement, including the completion of a free trade zone. The way is now open for technical completion of the final consolidated version of the Agreement with a view to its initialling as soon as possible. With Ukrainian parliamentary elections set for October 2012 and former Prime Minister Yulia Tymoshenko still in prison, advancement in the ratification process could be set back if election monitors uncover discrepancies.

The ceilings negotiated for poultry meat in the last round of negotiations are: 8.000 - 10.000 tons for poultry meat and an additional quota of 10.000 tons for frozen carcasses (all expressed in net weight) to be opened by Ukraine for EU and EU shall allow from Ukraine 16.000-20.000 tons poultry meat and poultry meat preparations and in addition 20.000 tons for frozen carcasses (all expressed in net weight) and with a linear increase in 5 years' time.

Moldova, Georgia and Armenia

EU launched free trade talks with Moldova and Georgia in December 2011. A deal could enhance political stability and security in both countries and boost the GDP. Both countries already benefit from preferential access to the EU market, meaning that existing import duties are already at a very low level. **a.v.e.c.** is following closely the developments on this matter. The EU is a net exporter in trade with the Caucasian countries (EUR 278 million in 2010). The EU exports some poultry meat preparations to the countries but there are no reciprocal exports to the EU.

Southern Mediterranean countries

While the Union for the Mediterranean is the main regional forum, EU-Southern Mediterranean relations at bilateral level are managed mainly through the Euro-Mediterranean Association Agreements.

In December 2011 the EU Foreign Affairs Council decided to authorise the opening of trade negotiations with Egypt, Jordan, Morocco and Tunisia as soon as the necessary preparatory process is completed. The negotiators are following the same track as in the case of Georgia and Moldova agreement.

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PERSPECTIVES ON POULTRY WORLD MARKETS (2012-2012)

Global meat markets in 2012 are expected to see a recovery of supplies in traditionally importing countries and strong competition for markets. The welcoming of Thailand on the EU market from July 2012 onwards along with the active attitude towards bilateral trade negotiations of the EU shall have a strong impact not only locally but also globally by creating competition. Remains to be seen how the negotiations will impact on poultry imports and exports because of the pending SPS issues.

Meat outlook perspectives in 2012

According to the Short term Outlook of DG AGRI EU meat consumption is expected to decrease by 0.7% in 2012 and 0.4% in 2013.

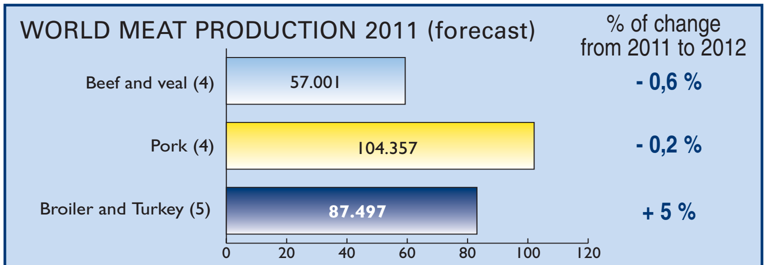
Only poultry meat has shown signs that consumption has been growing in 2011 and is expected to increase further over the outlook period 2012 given its healthy image and relative cheapness. Overall meat production in the EU should decrease slightly (by 1.1%) in 2012, and remain stable in 2013.

Production projections

Poultry continues to be a fast growing sector with a growth projected at 2.2%. The developing countries will continue their offensive in conquering global production share in meat categories and for the end of the period will account for 63% in poultry production and respectively 58% for bovine, 64% pig, 78% sheepmeat.

OECD forecasts that Russia will temper its meat production due to its WTO accession while South America will have smaller increase than it has had in recent decade.

Given the price incentives in laying hens, Oceania is expected to increase its production on a medium term.



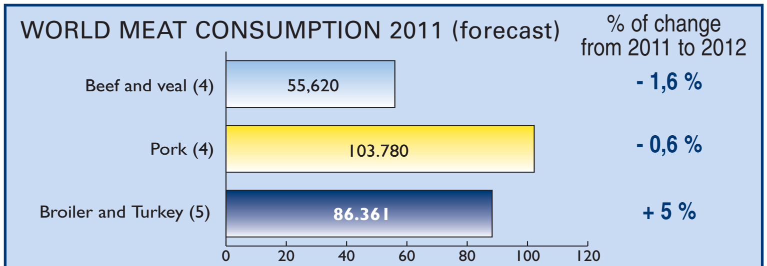
Source : USDA-FAS attache reports, official statistics, and results of office research, FAPRI

Global poultry meat consumption and prices

Per capita consumption will increase by 3,2 kg per annum, with poultry accounting for 70% of this increase. Consumption of meat by 2021 is expected to increase mainly in the developing countries with an extra 3,6 kg of meat per capita compared to the base period. The preferred meat for this increase shall be mostly poultry. The Eastern Europe is expected to have a substantial growth potential in red meats.

The high feed grain prices in the past 5 years are now transmitted to the market chain. In poultry where adjustments have largely been made already, the increase of feed prices is seen in higher meat prices. Real prices for poultry are projected to remain close to current levels. For all meats, real prices are currently at their highest levels of the past 15 to 20 years and will remain high considering that feed and energy prices will continue to remain high.

The high prices of meat will not discourage the developing countries to increase their imports, increase driven mainly by population and income growth expected in years to come. The strong prices will encourage the big meat producers to increase their exports, in spite of food safety and sanitary import restrictions. Other drivers keeping the prices high are: stringent food safety requirements, environmental and welfare requirements.

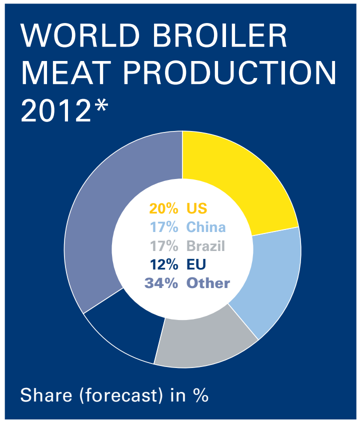


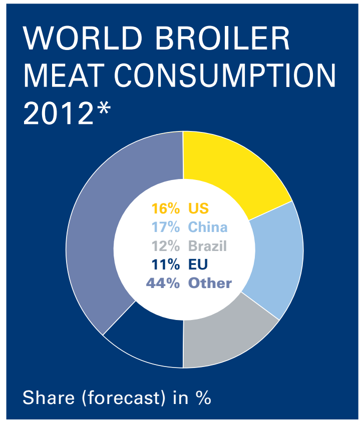
Source : USDA-FAS attache reports, official statistics, and results of office research, FAPRI

Projection highlights in trade.

Japan is expected to remain the main importing country for meat and is followed closely by China, Mexico and Saudi Arabia with Russia expected to remain the main market player in trade despite recent decrease of its imports.

The annual rate for poultry is expected to decrease in the first part of next decade from 5.5% to 2% due to high prices. US and Brazil shall maintain their dominance at global level and by 2021 they are expected to have 80% share of the total forecasted increase in world poultry trade





* 2011 Apr; estimates

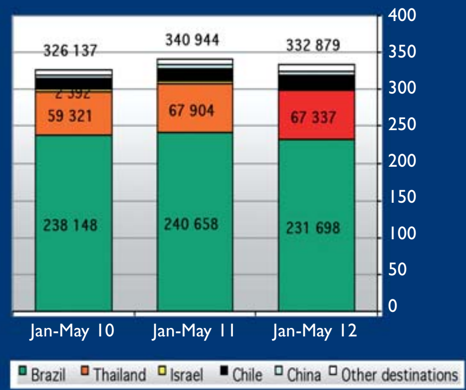
Main issues and uncertainties for EU poultrymeat trade

- Any change in the feed supply could change the forecast for poultry meat in next decade due to its sensitivity to macroeconomic conditions
- H1N1, Food and Mouth or BSE occurence could impact production and consumption trends
- The process of Russia becoming a member of WTO has been delayed, but it is expected to be finalised in the coming months. At the same time the Russian Federation has established a Customs Union with Kazachstan and Belarus that will not become a WTO member at the same time. It will be interesting how this will affect the international poultry trade.
- Africa has become in recent years a more important destination for European poultry meat and it will be a challenge for the EU to maintain this relationship.
- Thailand shall start using its quota of salted poultry meat in EU as of 1 July 2012. This is likely not directly impacting on the fresh poultry meat market, but may have an impact on the completion in the supply to the processing industry and food service.
- The currency exchange rate is important for the competitive position as we learn from the appreciation of the Brazilian currency affecting exports to Europe.
- Considering the high standards in animal health and welfare and the promotion thereof in trade agreements by the EU the structure of trade might be changed as regards both imports into the EU and EU exports of poultry meat.
- Environmental costs rising will impact all meats
- The future rules of labelling of origin could affect the decision of EU consumers, but we may not be to certain about this.

Processed poultry meat and origin labelling

After the publication of the Regulation (EU) 1169/2011 on the provision of food information to consumers in 2011 the Commission has ordered a study on the different options of origin labelling of meat. Based upon this study the European Commission shall submit to the European Parliament a report with implementing measures for the mandatory origin labelling of meat by 13 Dec 2013. As regards processed products a feasibility study on extension of COOL (country of origin labelling) to meat as an ingredient shall be presented by the same date. A similar study for products where ingredient represents more than 50% of a food shall be presented by 13 Dec 2014.
a.v.e.c. is advocating mandatory labelling of the place of farming of the poultry on all products containing more than 25% poultry meat.

IMPORTS of poultry Meat into EU (Tonnes cwe)

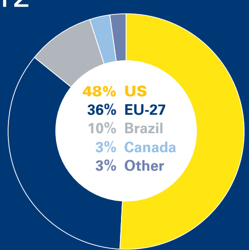


Source:
DG AGRI, ManCom July 2012

Trends for global turkey production and consumption

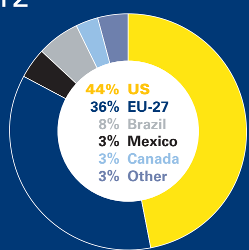
The production of turkey in 2012 is expected to remain stable compared to previous year estimates. No significant changes regarding quantities. US will continue to lead the production of turkey followed by EU, Brazil and Canada.

WORLD TURKEY MEAT PRODUCTION 2012*



Share (forecast) in %

WORLD TURKEY MEAT CONSUMPTION 2012*



Share (forecast) in %

* 2011 Oct. estimates

Consumption will be stable and in line with the production flow. The share in the global consumption shall be the following: US and EU with 44% and respectively 36% out of the world consumption followed by Brazil, Mexico and Canada with shares between 8% and 3% out of the global consumption.

Turkey meat (expressed in tons 'ready to cook') trade

According to forecasts the total exports of turkey meat shall represent 599 000 tons while the imports 376 000 tons. US, Brazil and EU will continue to dominate the exports of turkey ready to cook meat while Mexico is expected to be the main importer. For more details see graphic below.

2012* (1.000 tons - ready to cook equivalent)

	Imports	Exports
Mexico	164	1
EU-27	90	150
Brazil		142
South Africa	30	
China	45	
Russia	30	
Canada	8	25
US	9	281
TOTAL	**376**	**599**

*2011 Oct. Estimates

References:
www.fao.org
www.agri-outlook.org
www.fas.usda.gov.circular/2012/livestock
www.agri-outlook.org

EU POULTRYMEAT SUPPLY (000' t)

	2006	2007	2008	2009	2010	2011
	EU-25	EU-27				
Gross indigenous production	10.744	11.057	11.645	11.667	12.093	12.235
Export meat	1.240	811	905	928	1.149	1.287
Import of meat	650	829	864	848	782	801
Consumption	10.250	11.070	11.599	11.578	11.718	11.743
Consumption per capita, kg	22,1	22,4	23,3	23,2	23,4	23,4
Self-sufficiency%	105,0	99,9	100,4	100,8	103,2	104,2

Notes: Partial provisional or estimated.

Source: Since 2007 EU-Commission. So the gross domestic production is different to table No. 4.
2004 to 2006: Source MEG to Eurostat and national statistics.

PRODUCTION UPDATED 2012

Gross indigenous production of poultry meat in the EU (000't)

	2006	2007	2008	2009	2010	2011
Austria	109	119	120	121	125	125
Belgium/Luxembourg	274	277	257	259	250	244
Denmark	185	176	180	180	180	180
Finland	87	95	101	95	96	101
France	1.793	1.862	1.762	1.719	1.749	1800
Germany	1.185	1.273	1.391	1.460	1.623	1.663
Greece	169	106	191	186	186	181
Ireland	121	113	117	114	123	120
Italy	984	1.177	1.239	1.249	1.321	1.330
Netherlands	617	684	698	726	740	762
Portugal	289	318	325	346	342	335
Spain	1.149	1.149	1.172	1.178	1.281	1.278
Sweden	83	84	86	86	86	86
United Kingdom	1.535	1.460	1.462	1.458	1.573	1.590
EU-15	**8.579**	**8.894**	**9.101**	**9.177**	**9.675**	**9.795**
Cyprus	27	29	29	29	28	28
Czech Republic	229	217	212	212	212	212
Estonia	13	12	13	15	16	16
Hungary	386	376	388	388	377	410
Latvia	21	21	24	23	23	24
Lithuania	66	68	71	71	78	78
Malta	4	5	5	5	4	4
Poland	1.075	1.096	1.165	1.185	1.305	1.330
Slovenia	50	49	61	60	61	65
Slovakia	95	83	75	74	88	88
EU-25	**1.966**	**1.956**	**2.043**	**2.062**	**2.192**	**2.255**
Bulgaria	107	116	99	130	97	97
Romania	264	304	306	316	288	288
EU-27	**10.916**	**11.270**	**11.549**	**11.685**	**12.252**	**12.435**

Note: Partial provisional or estimated. For EU countries. Some significant differences between national and EUROSTAT data.
Sources: MEG to EUROSTAT, FAO and national data

POULTRY MEAT PRODUCTION IN THIRD COUNTRIES ('000 t)

	2006	2007	2008	2009	2010	2011
Argentina	1.202	1.288	1.445	1.546	1.643	.
Brazil*	9.708	10.763	11.498	11.489	12.797	13.459
Chile	614	581	611	604	594	.
China	14.286	15.175	15.996	16.415	16.987	17.100
Croatia	39	41	41	38	29	.
Japan	1.367	1.366	1.369	1.394	1.401	.
Russian Federation	1.624	1.918	2.044	2.360	2.580	2.800
Saudi Arabia	549	560	565	571	576	.
Switzerland	52	60	64	65	69	73
Thailand	1.048	1.072	1.105	1.105	1.150	.
Turkey	933	1.083	1.102	1.308	1.459	.
Ukraine	589	689	794	894	953	.
USA*	18.882	19.387	19.881	18.953	19.584	19.775
World Production	**82.982**	**87.919**	**92.528**	**94.204**	**98.090**	**101.500**

Note: Partial provisional or estimated. - *) Only Chicken and Turkey meat.
Sources: MEG to EUROSTAT, FAO and national data

IMPORTS OF EU-COUNTRIES POULTRYMEAT ('000 t)

	2000	2006	2007	2008	2009	2010	2011
Poultrymeat [1)]							
Austria	36	62	70	66	85	98	91
Belgium/Luxembourg	129	138	140	155	157	171	199
Denmark	17	43	42	47	48	57	62
Finland	3	4	4	5	5	5	5
France	153	211	255	279	310	346	370
Germany	386	407	457	434	460	491	462
Greece	87	48	50	7	66	54	56
Ireland	56	94	52	56	53	55	56
Italy	72	18	34	32	37	46	54
Netherlands	175	280	408	419	396	437	445
Portugal	14	26	28	33	39	40	42
Spain	99	109	124	118	119	126	121
Sweden	14	39	35	38	38	40	37
United Kingdom	295	381	381	335	339	380	410
EU-15 3rd countries							
Bulgaria	.	42	48	58	68	81	102
Cyprus	1	2	4	5	6	7	7
Czech Republic	18	58	53	64	77	79	91
Estonia	35	15	17	17	18	21	20
Hungary	21	31	33	47	45	38	44
Latvia	18	32	29	27	26	28	26
Lithuania	10	33	34	31	25	20	24
Malta	1	5	5	4	5	5	5
Poland	19	71	59	35	39	33	31
Romania	.	159	127	118	131	94	91
Slovakia	9	33	32	38	38	47	46
Slovenia	6	8	9	11	11	12	13
EU-25 /27 3rd countries5	**.**	**148**	**214**	**213**	**199**	**167**	**172**
Salted poultry meat2)							
Germany	62	30	62	61	52	36	35
The Netherlands	35	40	119	114	137	132	134
United Kingdom	9	7	19	24	33	36	46
EU from 3rd countries 4)	**109**	**86**	**219**	**204**	**213**	**196**	**203**
Preparations of poultry3)							
EU from 3rd countries 4)	**102**	**338**	**356**	**430**	**433**	**432**	**440**

Note: 1) Without preparations, livers, salted meat and live poultry. - 2011 partly preliminary. -Data in the EUROSTAT trade statistics and trade balance are partial different.
2) tariff "0210 90 29," from 2002 "0210 99 39", almost exclusively poultry.
3) tariff items 1602 31 .. 1602 32 and 1602 39 21, 29, 40 and 80 -
4) According to the respective territorial from.
5) From 2007: EU-27.
Source: MEG to Eurostat and national statistics.
Page 33 2012-

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

	2000	2006	2007	2008	2009	2010	2011
Austria	14	34	43	43	49	51	52
Belgium/Luxembourg	311	374	333	340	377	412	439
Denmark	124	99	104	105	92	103	88
Finland	2	14	15	14	13	13	15
France	736	460	477	483	479	505	548
Germany	158	323	385	416	402	446	448
Greece	6	8	16	16	13	15	21
Ireland	54	46	44	37	39	62	69
Italy	69	132	115	122	116	150	172
Netherlands	722	716	873	886	875	1.076	1.070
Portugal	2	5	8	9	9	11	16
Spain	67	63	78	97	90	128	145
Sweden	16	38	46	29	30	44	44
United Kingdom	190	258	291	278	258	270	295
Bulgaria	.	8	17	12	29	46	47
Cyprus	0	0	1	1	2	2	2
Czech Republic	9	21	22	23	23	26	25
Estonia	19	3	2	4	4	6	9
Hungary	122	91	105	124	130	150	172
Latvia	0	5	3	3	4	7	7
Lithuania	1	13	17	15	18	24	31
Malta	0	0	0	0	0	0	0
Poland	49	208	235	280	316	412	433
Romania	.	0	2	12	33	59	75
Slovakia	4	15	15	15	14	30	28
Slovenia	2	9	13	15	14	17	18
EU-25/27 2)	**.**	**872**	**757**	**857**	**886**	**1.125**	**1.264**

Note: 1) Without preparations, livers, salted meat and live poultry.
2) From 2007, EU-27. - 2011 partly preliminary. -
Data in the EUROSTAT trade statistics and trade balance are partial different. -
3) tariff items 1602 31 .. 1602 32 .. and 1602 39 21, 29, 40 and 80 - 4) According to the respective territorial from.
Source: MEG to Eurostat and national statistics.

Foreign trade with third countries of poultry and chicken meat ('000 t)

	2006	2007	2008	2009	2010	2011
Total imports of poultrymeat						
Switzerland	35	41	45	44	44	46
Imports of chicken meat						
China	343	482	399	401	.	.
Hong Kong 1)	243	215	236	253	295	410
Japan	716	696	737	645	789	895
Russian Federation	1.189	1.222	1.159	929	656	500
Saudi Arabia	423	470	510	605	681	788
United Arab. Emirates	182	238	289	297	289	314
Exports of chicken meat						
China	322	358	285	291	379	423
Brazil	2.502	2.922	3.242	2.992	3.181	3.219
Thailand	261	296	383	379	432	467
USA	2.361	2.678	3.157	3.093	3.069	3.171

Note: Partial provisional or estimated. - 1) Without transit goods.
Sources: MEG to USDA and national data.

PER CAPITA CONSUMPTION OF POULTRY MEAT IN THE EU AND THIRD COUNTRIES (KILOS)

	2006	2007	2008	2009	2010	2011
Austria	18,7	19,8	19,3	20,1	20,5	20,5
Belgium/Luxembourg	17,5	18,0	18,7	18,0	17,0	16,8
Denmark	21,7	22,5	24,0	24,4	23,8	24,1
Finland	15,6	16,5	17,0	16,6	16,7	16,9
France	23,0	24,0	23,0	23,0	23,5	23,7
Germany	16,7	17,8	18,3	18,8	18,7	18,9
Greece	19,3	20,0	20,5	21,0	20,7	20,5
Ireland	34,0	32,0	32,2	31,0	30,5	29,5
Italy	15,3	17,0	17,5	18,2	18,5	18,3
Netherlands	21,9	22,5	22,6	23,1	22,8	22,4
Portugal	29,8	31,5	32,5	34,0	33,9	33,8
Spain	31,0	30,5	30,5	30,5	30,2	30,5
Sweden	12,8	12,5	13,0	12,8	12,0	11,8
United Kingdom	29,8	28,0	27,7	28,0	28,7	28,8
Bulgaria	18,0	19,0	.	22,0	.	.
Czech Republic	25,7	24,0	23,8	23,9	23,5	24,0
Cyprus	.	.	.	.	.	.
Estonia	18,0	18,0	19,0	21,0	.	.
Hungary	32,0	29,0	30,0	29,0	28,8	28,5
Latvia	21,5	21,2	20,2	20,0	19,5	19,4
Lithuania	23,8	23,3	23,3	23,0	22,2	22,0
Malta	.	.	.	.	.	.
Poland	23,7	24,0	23,5	23,1	23,7	23,5
Romania	21,0	19,0	18,0	19,0	.	.
Slovakia	22,0	19,0	19,0	20,0	20,1	20,2
Slovenia	23,0	26,0	27,0	.	.	
EU-25/27 1)	**22,1**	**22,4**	**23,3**	**23,2**	**23,4**	**23,4**
Switzerland	14,3	15,9	17,0	16,8	17,2	17,9

Notes: EU-countries: Sometimes exists considerable differences between national and EUROSTAT Information; partially or provisionally estimated. - 1) From 2007 the EU-27.
Source: MEG to EUROSTAT, USDA and national statistics

SELF-SUFFICIENCY IN POULTRYMEAT (%)

	2006	2007	2008	2009	2010	2011
Austria	70	72	75	72	73	74
Belgium/Luxembourg	180	175	165	180	185	190
Denmark	157	150	145	141	146	135
Finland	106	106	105	104	104	105
France	121	119	119	117	117	118
Germany	86	87	93	95	106	108
Greece	79	82	79	74	80	82
Ireland	95	94	94	100	102	104
Italy	110	107	108	108	110	111
Netherlands	172	186	188	190	196	205
Portugal	92	94	93	92	92	93
Spain	96	96	97	97	99	101
Sweden	85	90	85	86	92	95
United Kingdom	85	90	95	94	93	93
Bulgaria	76	79	.	78	.	.
Czech republic	86	87	84	80	80	78
Cyprus	91	84	.	.	.	
Estonia	53	49	51	52	.	.
Hungary	120	128	128	134	140	143
Latvia	45	45	49	52	52	54
Lithuania	75	78	80	85	90	93
Malta	.	.	.	.	.	.
Poland	112	112	118	120	125	128
Romania	64	74	77	79	.	.
Slovakia	81	79	74	69	71	70
Slovenia	.	.	.	.	.	
EU-25/27 1)	**105**	**100**	**100**	**101**	**103**	**104**

Note: For EU countries are sometimes considerable differences between national and EUROSTAT Information; partially or provisionally estimated. - 1) From 2007 EU-27.
Source: MEG to Eurostat and national statistics.

BROILER

BROILER PRODUCTION IN THE EU AND THIRD COUNTRIES ('000 T)

	2006	2007	2008	2009	2010	2011
Austria	84	85	85	90	90	91
Belgium/Luxembourg	262	254	250	250	249	235
Denmark	163	171	175	175	175	175
Finland	75	84	91	86	88	93
France	886	993	1.009	1.027	1.042	1.076
Germany	749	826	868	911	1.022	1.090
Greece	150	161	160	160	160	160
Ireland	90	96	91	98	109	110
Italy	612	670	713	742	780	788
Netherlands	547	612	626	655	664	687
Portugal	219	245	251	263	269	265
Spain	1.030	1.034	1.059	1.063	1.085	1.073
Sweden	75	78	78	79	79	80
United Kingdom	1.290	1.261	1.267	1.269	1.380	1.357
EU-15	**6.232**	**6.570**	**6.723**	**6.868**	**7.191**	**7.280**
Bulgaria	66	82	74	79	77	81
Czech Republic	203	195	191	181	181	181
Cyprus	27	28	28	27	27	27
Estonia	14	14	14	14	14	14
Hungary	215	217	230	245	240	254
Latvia	21	21	23	23	23	24
Lithuania	61	63	65	67	72	76
Malta	4	5	5	5	4	4
Poland	824	896	730	1.060	1.123	1.200
Romania	273	312	316	371	349	350
Slovakia	86	83	76	75	76	77
Slovenia	44	43	52	54	54	55
EU 25/EU 27[1])	**8.069**	**8.528**	**8.526**	**9.067**	**9.432**	**9.623**
Argentine	1.200	1.320	1.435	1.500	1.680	1.770
Brazil	9.355	10.305	11.033	11.023	12.312	12.863
China	10.350	11.291	11.840	12.100	12.550	13.200
India	2.000	2.240	2.490	2.550	2.650	2.900
Iran	1.327	1.423	1.450	1.525	1.600	1.660
Mexico	2.592	2.683	2.853	2.781	2.822	2.900
Russian Federation	1.180	1.410	1.680	2.060	2.310	2.575
South Africa	1.113	1.159	1.240	1.250	1.290	1.300
USA	16.103	16.226	16.561	15.935	16.563	16.694

Notes: Mainly provisional or estimated, official data on chicken production and consumption of only a few countries. - EU data based on gross domestic production.
1) From 2007 EU 27 Partly contradictory towards official information on poultry meat products.
Source: MEG to USDA, FAO and national figures.

PER CAPITA CONSUMPTION OF BROILER IN SELECTED EU AND THIRD COUNTRIES (KILOS)

	2006	2007	2008	2009	2010	2011
Austria	11,5	11,9	11,8	12,3	12,6	12,7
France	12,9	13,7	12,9	12,7	13,1	13,5
Germany	9,0	10,1	10,2	10,8	10,8	11,2
Italy	9,5	10,7	11,0	11,4	11,5	11,6
Netherlands	17,5	18,2	18,4	19,0	18,8	18,5
United Kingdom	23,5	22,5	22,2	22,4	22,8	22,6
EU 27	**15,5**	**16,6**	**16,9**	**17,1**	**17,4**	**17,6**
3rd countries						
Argentina	28,4	30,5	32,1	33,1	35,1	37,0
Brazil	36,4	38,1	39,7	40,4	45,6	47,9
China	7,8	8,4	8,8	8,9	9,1	9,4
India	1,7	1,9	2,1	2,1	2,2	2,2
Iran	18,5	20,5	20,2	21,1	22,4	23,5
Japan	15,5	15,4	15,2	15,6	16,4	16,3
Mexico	28,3	28,0	29,7	29,1	29,5	30,4
Russian Federation	16,6	18,4	19,8	20,8	20,6	20,4
South Africa	24,7	28,5	29,0	29,0	30,4	31,8
United Arab Emirates	.	54,9	63,8	63,1	59,1	.
USA	44,7	45,0	44,1	42,1	43,4	44,4

Note: Mainly estimated official data on chicken consumption of only a few countries available. Because of shrinking database continuation of earlier time series is not always possible.
Source: MEG, according to its own and national estimates, and national information.

TURKEY

TURKEY PRODUCTION IN THE EU AND THIRD COUNTRIES ('000 T CARCASS WEIGHT)

	2006	2007	2008	2009	2010	2011
Austria	24	24	24	25	25	25
Belgium/Luxembourg	7	4	4	4	4	3
Denmark	0	1	1	0	0	0
Finland	12	11	10	9	9	8
France	519	469	456	421	409	400
Germany	331	330	386	383	434	401
Greece	1	3	3	3	3	3
Ireland	27	25	16	8	8	4
Italy	276	290	300	293	279	275
Netherlands	30	30	29	27	28	27
Portugal	41	42	40	38	39	38
Spain	21	18	25	28	111	104
Sweden	3	3	3	4	4	4
United Kingdom	184	165	160	157	162	170
EU-15	**1.477**	**1.415**	**1.457**	**1.399**	**1.513**	**1.462**
Bulgaria	0	1	1	0	0	0
Czech Republic	9	4	4	4	4	4
Cyprus	1	1	1	1	1	1
Estonia	.	.	.	.	.	.
Hungary	127	126	120	110	100	101
Latvia	.	.	.	.	.	.
Lithuania	4	.	.	.	.	.
Malta	0	0	0	0	0	.
Poland	272	285	285	280	280	280
Romania	.	.	.	.	.	.
Slovakia	14	14	14	14	14	14
Slovenia	8	7	6	6	6	7
EU-25/EU 271)	**1.917**	**1.858**	**1.893**	**1.820**	**1.923**	**1.874**
Brazil	353	458	465	466	485	505
Canada	163	170	180	167	159	160
Mexico	14	15	15	11	11	10
Russian Federation	19	30	39	31	70	90
USA	2.577	2.664	2.796	2.535	2.526	2.593

Notes: Partial provisional or estimated, official data on turkey production only a fewCountries. - EU data based on gross domestic production. -
1) From 2007 the EU-27.
Source: MEG to FAO, USDA and national data.

PER CAPITA CONSUMPTION OF TURKEY IN SELECTED EU AND THIRD COUNTRIES (KILOS)

	2006	2007	2008	2009	2010	2011
Austria	6,0	6,5	6,2	6,4	6,3	6,3
France	5,7	5,5	5,2	5,0	4,9	4,8
Germany	5,9	5,7	6,2	6,2	6,1	6,0
Italy	4,5	5,0	5,0	4,9	4,8	4,7
Netherlands	1,6	1,5	1,2	1,1	1,0	1,0
United Kingdom	4,5	4,0	3,9	4,0	4,0	4,1
EU 27	**3,7**	**3,6**	**3,5**	**3,4**	**3,5**	**3,4**
3rd countries						
Brazil	1,0	1,5	1,4	1,6	1,7	1,9
Canada	4,4	4,5	4,9	4,5	4,2	4,2
Mexico	1,9	1,9	1,9	1,4	1,4	1,5
Russian Federation	0,8	0,7	0,7	0,5	0,7	0,9
USA	7,6	8,0	7,9	7,7	7,4	7,3

Note: Mainly estimated official data on turkey consumption of only a few countries available. Because of shrinking database continuation of earlier time series is not always possible.
Source: MEG, according to its own and national estimates, and information.

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DUCK

DUCK PRODUCTION IN EU COUNTRIES ('000 T)

	2006	2007	2008	2009	2010	2011
Austria	0,1	0,1	0,1	0,1	0,1	0,1
Belgium/Luxembourg	0,2	0,0	0,3	0,1	0,1	0,0
Denmark	4,5	0,0	0,0	0,0	0,0	0,0
Finland	0,0	0,0	0,0	0,0	0,0	0,0
France	261,5	272,0	270,0	240,7	238,0	243,7
Germany	49,8	63,6	67,1	67,8	67,3	63,0
Greece	0,1	0,2	0,2	0,2	0,2	0,2
Ireland	6,5	6,5	5,8	3,9	4,2	4,0
Italy	15,0	15,0	15,0	15,0	14,0	14,0
Netherlands	17,0	17,0	17,0	17,0	18,0	17,0
Portugal	8,0	8,0	10,0	10,0	10,0	9,0
Spain	0,0	0,0	0,0	0,0	4,8	4,3
Sweden	0,2	0,2	0,0	0,0	0,0	0,0
United Kingdom	45,0	38,0	35,0	32,0	31,0	33,0
EU-15	**408**	**421**	**420**	**387**	**388**	**388**
Bulgaria	18,2	16,8	13,0	17,5	18,0	21,0
Cyprus	0,2	0,2	0,2	0,2	0,2	0,2
Czech Republic	3,8	5,9	8,8	8,8	8,8	8,8
Estonia	.	.	.	.	.	.
Hungary	42,0	58,0	49,0	55,0	61,0	71,0
Latvia	.	.	.	.	.	.
Lithuania	0,2	0,2	0,3	0,2	0,2	0,3
Malta	.	.	.	.	.	.
Poland	16,0	17,0	17,2	17,0	17,2	17,3
Romania	.	.	.	.	.	.
Slovakia	1,0	0,5	0,4	0,4	0,5	0,5
Slovenia	1,2	1.2	.	.	.	
EU-25/EU 27 1)	**493**	**523**	**512**	**488**	**496**	**510**

Notes: Partial provisional or estimated (base = gross domestic production), official data onDuck production of only a few countries. -
1) From 2007, EU-27.
Source: MEG to FAO and national data.

POULTRY MEAT MARKET PROJECTIONS FOR THE EU 27, PERIOD 2012-2021* (000't ready to cook weight)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Production (kt)	12.031	12.122	12.155	12.138	12.212	12.253	12.306	12.419	12.472	12.534
Imports (kt)	793	783	792	816	827	829	830	830	835	827
Exports (kt)	1.334	1.302	1.216	1.161	1.150	1.140	1.136	1.123	1.121	1.093
Trade balance (kt)	541	519	425	346	323	311	307	293	286	266
Consumption (kt)	11.490	11.603	11.731	11.793	11.889	11.942	11.999	12.126	12.186	12.268
Consumption per capita (kt)	20,07	20,23	20,38	20,43	20,55	20,59	20,64	20,81	20,86	20,97

Source: OECD, July 2012

http://stats.oecd.org/OECDStat_Metadata/ShowMetadata.ashx?Dataset=HIGH_AGLINK_2012&ShowOnWeb=true&Lang=en
* in the 2011 Annual Report of **a.v.e.c.** the sources of the projections have been the "Prospects for agricultural markets and income in the EU 2009-2020, The European Commission, DG AGRI, December 2010". The slide different figures of 2012 annual report are explained by the different source used.

OVERALL MEAT MARKET PROJECTIONS FOR THE EU-27, 2009-2018 (000't cwt* and rtc*)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Production	**44.063**	**44.255**	**44.391**	**44.505**	**44.509**	**44.708**	**44.780**	**44.936**	**44.991**	**45.054**
Imports	**1.391**	**1.378**	**1.395**	**1.421**	**1.422**	**1.414**	**1.419**	**1.434**	**1.428**	**1.425**
Exports	**3.839**	**3.883**	**3.729**	**3.639**	**3.594**	**3.614**	**3.615**	**3.627**	**3.599**	**3.591**
Trade balance	**2.448**	**2.505**	**2.334**	**2.218**	**2.172**	**2.200**	**2.196**	**2.194**	**2.171**	**2.166**
Consumption	**41.621**	**41.742**	**42.061**	**42.289**	**42.337**	**42.503**	**42.587**	**42.747**	**42.823**	**42.887**
Consumption per capita	**65,64**	**65,73**	**66,03**	**66,21**	**66,14**	**66,23**	**66,21**	**66,32**	**66,29**	**66,29**
of which Beef and veal (cwe)	11,31	11,21	11,20	11,16	11,20	11,20	11,17	11,14	11,06	11,06
of which Sheepmeat(cwe)	1,88	1,89	1,90	1,89	1,87	1,86	1,84	1,82	1,80	1,80
of which Pigmeat (cwe)	32,38	32,40	32,55	32,72	32,51	32,59	32,57	32,56	32,57	32,46
of which Poultry meat (rtc)	20,07	20,23	20,38	20,43	20,55	20,59	20,64	20,81	20,86	20,97

*rtc= ready to cook
*cwt= carcass weight equivalent

Source: OECD FAO Agricultural Outlook 2010-2019. Earlier avec reports have used DG AGRI statistics. For this reason there are significant variations e.g. in per capita consumption as stated by DG AGRI and in the current table based on data drawn from OECD FAO.
The rtc weight used by OECD -FAO for poultry meat corresponds to an rtc (approximately 73 % of live weight depending on species and country).

TABLE EU 27 POULTRYMEAT IMPORT - EXPORT TRADE MAIN TARIFF LINES, 2000 - 2005 - 2010 - 2011

IMPORTS

Source: Extraction EUROSTAT, July 2012

CN CODE	Product definition	QUANTITY 100 KG				VALUE € /100KG	
		2000	2005	2010	2011	2010	2011
0207 (poultry)	**MEAT AND EDIBLE OFFAL, OF THE POULTRY HEADING 0105, FRESH, CHILLED OR FROZEN**	**1.291.611**	**4.321.451**	**1.667.915**	**1.721.367**	**188,27**	**205,47**
02071290	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65 % chickens'	37.605	102.912	110.289	111.717	127,77	138,93
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	657.901	2.408.760	948.908	1.067.242	224,11	237,65
02071460	Frozen legs and cuts thereof of fowls of the species gallus domesticus, with bone in	131.120	406.058	116.825	83.911	146,67	134,08
02071470	Frozen cuts of fowls of the species Gallus domesticus, with bone is (excl. Halves or quarters, whole wings, with or without tips, backs, necks, backs with necks attached, rumps and wing-tips, breasts, legs and cuts thereof)	31.954	43.130	30.553	31.540	154,35	169,75
02072710	Frozen boneless cuts of turkeys of the species domesticus	79.809	168.457	129.169	128.787	281,69	335,70
02109939	**MEAT, SALTED, IN BRINE, DRIED OR SMOKED**		**32.804**	**1.956.437**	**2.045.223**	**230,57**	**250,55**
1602 (poultry)	**PREPARED/PRESERVED MEAT**	**863.397**	**3.093.443**	**4.318.271**	**4.405.627**	**278,70**	**302,80**
160231	**TURKEYS**	**300.920**	**945.610**	**845.204**	**680.243**	**267,37**	**321,70**
16023111	**Preparations containing exclusively uncooked turkey meat (excl. sausages and similar products)**	289.398	927.902	796.703	660.714	260,69	316,42
160232	**GALLUS DOMESTICUS**	**544.233**	**2.077.864**	**3.335.579**	**3.577.563**	**269,93**	**290,02**
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	119.053	146.723	286,89	283,96
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	2.344.773	2.473.319	298,82	323,09
16023230	Prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 25% but < 57% of poultrymeat or offal (excl. of turkeys and guinea fowl etc.)	7.203	56.310	817.017	907.981	182,95	200,98
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**	52.816	49.385	304,66	289,65
160239	**OTHER**	**18.244**	**69.969**	**137.488**	**147.821**	**560,95**	**525,20**
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	132.065	141.569	563,60	525,12

EXPORTS Source: Extraction EUROSTAT, July 2012

CN CODE	Product definition	QUANTITY 100 KG				VALUE € /100KG	
		2000	2005	2010	2011	2010	2011
0207 (poultry)	**MEAT AND EDIBLE OFFAL, OF THE POULTRY OF HEADING 0105, FRESH, CHILLED OR FROZEN**	**9.586.225**	**8.566.154**	**11.252.421**	**12.638.346**	**105,08**	**111,28**
02071210	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '70% chickens',	526.148	238.326	236.448	219.538	106,59	113,90
02071290	Frozen, plucked and drawn, without heads and feet and without necks, hearts, livers and gizzards, known as '65% chickens',	2.692.599	2.226.673	2.784.006	3.159.653	113,98	130,02
02071410	Frozen boneless cuts of fowls of the species Gallus domesticus	894.080	1.088.275	1.881.704	2.008.239	51,76	60,74
02071420	Frozen halves or quarters of fowls of the species gallus domesticus	889.227	387.310	1.077.984	852.563	115,53	114,25
02071430	Frozen whole wings, with or without tips of Gallus domesticus	945.626	645.813	946.603	1.278.129	117,64	118,42
02071460	Frozen legs and cuts thereof of fowls of the species gallus	357.815	279.290	484.404	586.816	87,49	89,19
02071470	Frozen cuts of Gallus domesticus, with bone in (excl. halves or quarters, whole wings, with or without tips, backs, necks, backs with necks attached, rumps and wing-tips, breasts, legs and cuts thereof	283.426	853.245	607.130	704.243	83,11	76,46
02072710	Frozen boneless cuts of turkeys of the species domesticus	1.563.698	581.402	310.365	330.130	83,28	73,32
02072730	Frozen whole wings, with or without tips, of turkeys	121.849	179.604	217.455	252.774	125,90	146,47
0207 other		963.737	1.230.602	1.238.028	1.499.320	191,30	193,79
1602 (poultry)	**PREPARED/PRESERVED MEAT**	**294.927**	**289.901**	**451.478**	**488.615**	**279,28**	**306,51**
16023219	Cooked, prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 57% meat or offal of poultry	111.459	136.561	181.770	217.540	286.05	302.94
16023230	Prepared or preserved meat or meat offal of fowls of the species Gallus domesticus containing >= 25% but < 57% of poultrymeat or offal (excl. of turkeys and guinea fowl etc.)	38.938	56.368	103.587	143.786	309.15	306.20
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.)						
1602 other		144.530	96.972	166.121	127.289	253.25	312.95

ADOPTED, UPCOMING AND PENDING EU LEGISLATION PROPOSALS

ANIMAL WELFARE

Animal welfare strategy 2012-2015 (on-going)

On 19 January 2012 the Commission published its Communication on the EU Strategy for the Protection and Welfare of Animals 2012-2015 along with an impact assessment. The strategy provides for a two-folded approach: a proposal for a comprehensive animal welfare law and a reinforcement of current actions. The legislation to be proposed is expected to promote an innovative approach focusing on actual welfare outcomes instead of mechanistic inputs, and to increase the focus on the education and professional standards of all parties concerned. The Commission is expected to draft an animal welfare framework Proposal law in 2012.

Directive 2007/43/EC. Minimum rules for protection of chickens kept for meat production and EFSA external report updating the EFSA opinions on the welfare of broilers and broiler breeders .

On 14 June 2012 EFSA published on her website the study on the welfare of broilers and broiler breeders drawn up by Wageningen UR Livestock Research, Swedish University of Agricultural Sciences, University of Bristol and IKERBASQUE Research. It is based on 3 previous EFSA opinions on the welfare of broilers (welfare of broilers, influence of genetic parameters, welfare aspect of management and housing GP and P for breeding purposes) and the Welfare Quality assessment protocol. The study concludes that more research is needed for the grand-parent and parent stocks and on animal behaviour and its influence on welfare.

Member States and the Commission are currently evaluating indicators to be used for the data collection of a representative sample of flocks. The Commission will use this information for its report concerning the application of this Directive and its influence on the welfare of chicken, likely not before 2014.

Regulation 2005/1/EC. Protection of animals during transport (under revision)

The report of the Commission on the impact of this regulation concluded that harmonised interpretation, implementation and enforcement of the current regulation is firstly to be achieved. In the discussion in the European Parliament more attention has been paid to the transport of poultry. The EFSA scientific report has identified as critical points the ventilation in case poultry is transported during more than 4 hours, total transport time and unloading and "fitness" for transport.

Parliament adopted a written declaration demanding a maximum 8 hour limit for the transport of live animals to slaughter. This will be submitted for a vote in Council and Commission.

The Report is scheduled for a Parliamentary Committee vote in 9-10 July with a plenary vote to follow in September 2012.

Regulation 2009/1099/EC. Welfare of animals at stunning

The regulation enters into force 1 January 2013. On 24 October 2012 a conference on the implementation will be organised.

No later than 8 December 2013, the Commission shall submit to the European Parliament and to the Council a report on the various stunning methods for poultry, and in particular multiple-bird water bath stunners, taking into account animal welfare aspects, as well as the socio-economic and environmental impacts. EFSA published in June 2012 a report on electrical requirements of waterbath stunning of poultry concluding that stunning requirements should be adjusted for each bird and unless problems detected for water bath stunning methods can be resolved, other stunning methods should be used. The big issue is how to maintain the meat quality while respecting the electrical requirements. **a.v.e.c.** members are working on development of SOPs.

ANIMAL HEALTH

EU Animal Health Law

The Commission is drafting an EU Animal Health Law with the aim to create a clearer regulatory structure for animal health in the EU covering many different policy areas. The regulation will contain general rules as regards principles, responsibilities, disease prioritization, surveillance, prevention, preparedness, control and eradication, specific rules for species and a harmonized EU framework for responsibility- and cost-sharing will be developed. The Commission aims to adopt it by the end of 2012, but the challenge of the Lisbon treaty is delaying the process. A consultation and language translation is also foreseen before that date.

SANCO/6876/2009- AMR (antimicrobial resistance) - (on-going)

The Commission launched on 15 November 2012 the 5 years action plan aiming to "strengthen the prevention and control of antimicrobial resistance across all sectors" and has started working on a legislative proposal. On 22 June 2012 the Council has adopted its conclusions on the impact of antimicrobial resistance in the human health sector and in the veterinary sector. Apart from a call upon Member States to develop national strategies and action plans, the conclusions also call upon the Member States and the Commission to examine the conditions of prescription and sale of antimicrobials in order to ascertain whether practices in human and animals healthcare may lead to over-prescription, overuse or misuse of antimicrobials.

The Commission is considering banning the use of certain antibiotics in the veterinary sector considered to be critical for human use.

FOOD AND FEED SAFETY

Regulation 2011/1086/EC from 27 October 2011 amending Annex II to Reg. 2003/2160/EP and Council and Annex I to Reg. 2005/2073/EC as regards Salmonella in fresh poultry meat

It has entered into force 1 December 2011. From then Salmonella enteritidis and typhimurium has to be absent in 25g poultry meat. Salmonella serotyping at farm level is a prerequisite for the further handling of the meat of these flocks in the slaughterhouse.

The food business operator (FBO) is responsible for the compliance of his products with the legal provisions as food safety criterion and the competent authority is supervising that the FBO accomplishes his responsibility.

SANCO/10976/2012 Draft Commission Regulation concerning a Union target for the reduction of Salmonella Enteritidis and Salmonella Typhimurium in flocks of turkeys, as provided for in Reg. 2160/2003 of EP and Council (on-going)

This proposal will replace Regulation 584/2008. The existing target of less than 1% of the turkey fattening and breeding flocks testing positive for Salmonella enteritidis and typhimurium will not be changed. **a.v.e.c.** is advocating to maintain the validity period of the sampling and testing results that according to the proposal would be more stringent.

Commission implementing Regulation 931/2011 of 19 September 2011 on the traceability requirements set by Regulation 178/2002 of EP and Council for food of animal origin
The purpose of the regulation is to require food business operators to make available in an appropriate form to the food business operator to whom the food is supplied and, upon request, to the competent authority, information relating to the consignment (description, volume, producer, consignor etc.). For imported food of animal origin, this information is already present in the health certificate accompanying the batch. This Regulation has entered into force.

Regulation 16/2012 of 11 January 2012 amending Annex II to Reg. 853/2004 as regards the requirements concerning frozen food of animal origin intended for human consumption
The purpose of the current draft Regulation 853/2004 is to require food business operators to make available in an appropriate form to the food business operator to whom the food is supplied and, upon request, to the competent authority, information relating to the date of production and freezing of frozen food of animal origin. This Regulation has entered into force.

SANCO/10803/2011. Revision of the hygiene package: Reg. 852/2004 - 853/2004 - 854/2004 (on-going but Impact Assessment (IA) finalised)
The report on the implementation of the hygiene package in 2009 concluded that the implementation of the Hygiene package is in general satisfactory and there is no need for an overall overhaul. However certain adjustments are to be considered.
Thereafter the Commission has made adjustments by comitology procedure if possible. The Commission is now preparing adjustments that need to be arranged by the ordinary legislative procedure. The relevant issue here is the use of substances other than potable water and the definition of fresh meat in this context. The draft proposal is expected to be presented end of 2012 by the Commission to EP and Council including the Impact Assessment. The issues of definition of meat preparations and meat products may likely be clarified by an explanatory note from the Commission. As regards mechanically separated meat (MSM) the discussion continues and the Commission will first give EFSA a mandate for having an opinion before making further steps.

Modernisation of Meat Inspection in EU slaughterhouses (on-going)
The European Commission aims to modernise the meat inspection in EU slaughterhouses by developing a risk-based approach for considering specific hazards related to production systems. EFSA's opinion from June 2012 that provides a scientific basis for the modernisation of poultry meat inspection proposes that risk-based interventions coupled with the improved use of information shared between farms and abattoirs (known as Food Chain Information) would be more effective since traditional poultry meat inspection may not suffice to fully address the most relevant biological hazards to public health: Campylobacter spp., Salmonella spp. and ESBL/AmpC gene-carrying bacteria. A conference focusing on the future poultry meat inspection is expected to be organised end of 2012.

Reintroduction of Processed Animal Protein (PAPs) - SANCO/10843/2011 amending Reg. 999/2001 laying down rules for the prevention, control and eradication of certain transmissible spongiform encephalophathies (on-going)
Different from the expectations the ban on feeding animal proteins remains in place since the test to discriminate the protein of different species has not been validated yet. This test is indispensable to control the ban on intra-species use which is laid down in Regulation 1069/2009.
A vote on Commission proposals to re-authorise non-ruminant animal proteins for fish feed has been postponed on 28 June 2012 and a new vote is expected to come soon. Thereafter the next step would be the reintroduction of animal protein in feed for poultry and pigs after the reliable PCR tests for pig and poultry have been established.

Impact Assessment on animal cloning and future Proposals
The Commission is conducting an Impact Assessment on animal cloning which could be finalised by the end of 2012. This shall be used for the legislative proposals on animal cloning that are due to be published early 2013.
Following an EFSA consultation on animal cloning for food production and the request from the European Commission EFSA has reconfirmed that with respect to food safety, there are no indications that differences exist between food products derived from healthy clones or their offspring - in particular milk and meat - from those of healthy, conventionally bred animals. Nevertheless, the Authority recognises that animal health and welfare concerns continue to be associated with this technology.

MARKETING STANDARDS - LABELLING - PRODUCT QUALITY

Regulation 543/2008 implementing Reg. 1234/2007 - marketing standards for poultry meat (pending)
The Commission deems it needed to amend the regulation as regards the chilling methods, since a new chilling system using a combination of the methods mentioned in the regulation is introduced. The Commission is aiming at covering this and future developments by proposing that the water content criterion of air chilled poultry will be applicable on any other chilling system used. **a.v.e.c.** is waiting for the Commission reaction to its proposal for other amendments that regards especially the definitions, the chilling methods, the origin labelling and the requirements, registration and record keeping of different types of farming. As regards the definitions of "meat product" and "meat preparation", the interpretation according to Regulation 853/2004 will be followed. It is evident that the amendments of the regulation may take some years given the possible impact assessments by the Commission and the involvement of the Council and European Parliament.

Regulation 1169/2011 of 25 October 2011 on the provision of food information to consumers (adopted) amending Reg. 1924/2006 and 1925/2006 of the European Parliament and of the Council, and repealing Commission Directive 87/250/EEC, Council Directive 90/496/EEC, Commission Directive 1999/10/EC, Directive 2000/13/EC of the European Parliament and of the Council, Commission Directives 2002/67/EC and 2008/5/EC and Commission Regulation No 608/2004.
The Regulation was published on the 13 December 2011. It will apply from 13 December 2014, with the exception of point (l) of Article 9(1) (mandatory nutrition declaration), which shall apply from 13 December 2016, and Part B of Annex VI (specific requirements regarding the designation of minced meat), which will apply from 1 January 2014. Some of the new requirements of this Regulation include the introduction of a minimum font size for mandatory information, allergen labelling for foods sold unpackaged, labelling requirements regarding foodstuffs sold via the internet, country of origin labelling and it also introduces mandatory nutrition labelling for many pre-packaged foodstuffs. Studies and Impact Assessments will be made on the origin labelling of different foodstuffs, but it will be mandatory for the fresh meat anyway from end of 2013.

FAO, European SCP roundtable and DG ENVI and JRC initiatives: SUSTAINABLE PRODUCTION AND CONSUMPTION ALONG THE FOOD CHAIN

Livestock farming and the consumption of animal products make a crucial contribution to the economic and nutritional wellbeing of millions of people around the world - particularly in developing countries. The European poultry producers along with other meat sectors are under constant pressure to improve the overall efficiency along the production chain. Legislative initiatives with an effect on production costs and resources used in processing, food safety and animal health and welfare criteria challenge our production to become more efficient and sustainable.

For this reason **a.v.e.c.** found it appropriate to join the SCP initiative founded in 2009 and with the IPC to join the FAO Multi-stakeholder Partnership initiative.

FAO LED PARTNERSHIP ON THE ENVIRONMENTAL BENCHMARKING OF LIVESTOCK SUPPLY CHAINS

FAO has with private organisations launched on 4 July 2012 in Rome a Public-Private Project "Partnership on the environmental benchmarking of livestock supply chains". The partnership is looking to improve how the environmental impacts of the livestock industry are measured and assessed, a necessary first step in improving the sustainability of this important food production sector. FAO estimates that demand for livestock products will continue to intensify over the decades to come. Meat consumption is projected to rise nearly 73% by 2050, with a large proportion of this being poultry meat.

The private livestock sector includes organizations (producer and processor organizations) engaged in the livestock supply chain representing various sub-sectors as IDF (dairy), IEC (eggs), IFIF (feed), IMS (pork, beef and lamb) and IPC (poultry meat) .

A 3 year initial plan has decided to work on: developing and agreeing on general scientific methods for calculating the carbon footprint for livestock, creation of a data base for carbon footprint and rearing systems, studying different feed types used in the process, monitoring water consumption and last but not least engaging a communication campaign to promote the methodologies and findings of the initiative.

EU Sustainable Consumption and Production (SCP) initiatives and challenges for the European poultry production

European Food Sustainable Consumption and Production (SCP) Roundtable was created in 2009 as a multi stakeholder initiative which aims to promote science-based, coherent approach to sustainable consumption and production in the food sector considering interaction across the entire food chain. Since 2009 the SCP's 4 working groups have worked on different aspects of environmental impact of the European food production:

- the working group 1 has worked on the development of a guidance document - the ENVIFOOD PROTOCOL - based on recommended environmental, scientifically documented assessment methodologies (Life cycle assessments- LCAs and product category rules - PCRs. The Protocol will be sent in public consultation in fall 2012. Furthermore a test pilot will be launched in October 2012 permitting companies to test the protocol.
- the working group 2 in 2009 looked at possible communication tools for conveying information to consumers about environmental product performance and is aiming at publication of recommendations on communication tools and channels in 2013. The working group will supply evaluation on the ENVIFOOD PROTOCOL to working group 1 by questionnaires and feed back from companies participating in the test pilot during 2013.
- the working group 3 has worked on evaluation of existing improvements and recommending future further environmental improvements along the food chain. The recommendations of this group should be approved in Oct 2012. The working group may receive a new mandate in Oct 2012 for looking into issues of food waste.
- the working group 4 has looked into the non-environmental aspects of sustainability and has finalized its work in 2010.

European Commission activities on sustainable consumption and production

Parallel to the SCP private sector initiative, DG ENVI, JRC (the Commission's joint research centre IES) and other European Commission services are working towards the development of a harmonized methodology for the calculation of the environmental footprint of products including carbon footprints. The methodology will be building on the International Reference Life Cycle Data System (ILCD Handbook) as well as on other existing methodological standards and guidance document

- like ISO 14040-44, PAS 2050, BP X30 - which have also been included in the work of the SCP working group 1.

References:
http://www.efsa.europa.eu/en/supporting/pub/295e.htm
http://www.fao.org/ag/againfo/livestock-benchmarking/livestock-partnership/en/
For more information on the DG ENVI initiative:
http://ec.europa.eu/environment/eussd/product_footprint.htm

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