



# Annual report 2025



# AVEC is the voice of the European poultry meat sector

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We represent the sector to international and EU decision-makers, focusing on key areas such as animal health and welfare, food safety and quality, trade, and sustainability.

We have three core aims:

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

Our members are national organisations representing poultry processors and the poultry trade in 16 EU countries and the UK. AVEC's members represent 95% of European poultry meat production.

For more information, please visit [www.avec-poultry.eu](http://www.avec-poultry.eu)

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The background of the page is a photograph of a modern, multi-story glass building with a curved facade. In the foreground, several European Union flags are flying on tall, dark flagpoles. The entire image is overlaid with a semi-transparent blue filter. The word "Introduction" is written in a large, white, sans-serif font across the middle of the image.

# Introduction







# Introduction

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The past year has redrawn the European policy map. Where the previous mandate revolved around the Green Deal, the new Commission has focused on a single purpose: **competitiveness**.

Its *Vision for Agriculture and Food* places food security, strategic autonomy and fair trade at the heart of EU priorities, and recognises livestock as “an essential part of Europe’s economic strength and cohesion”.

**After years of defensive debates in which the agri-food sector was constantly on the back foot, Brussels is once again recognising that high-quality, EU-produced food is vital for the wellbeing of its citizens. That is welcome news for poultry.**

At AVEC, we are determined to underpin this new narrative with facts. We have commissioned an **update of our 2018 competitiveness study** due in October 2025, extending the scope to turkey and duck and capturing 2024 cost data for ten EU and nine non-EU producers. The study will also quantify the extra cost of EU legislation, demonstrate our contribution to rural jobs and feed markets, and model trade-policy scenarios. By placing hard numbers on the table we will help policymakers ensure that the Union’s high standards remain an asset, not a handicap.

A more constructive, evidence-based dialogue is likewise emerging in Parliament. December witnessed the creation of the EU Parliament **Intergroup on Sustainable Livestock**. The group brings together Members of the

European Parliament from across the political spectrum to examine livestock policy through the triple lens of environment, welfare and competitiveness.

In the same spirit, the European Commission has established the European Board on Agriculture and Food (EBAF) and a new Livestock Workstream. These initiatives fulfil a key recommendation of the [Strategic Dialogue on the Future of Agriculture](#) towards a new culture of dialogue, trust and multistakeholder participation in the preparation of future policies. AVEC has contributed to the new Livestock Workstream defending a vision of sustainable and competitive poultry farming, stressing the importance of maintaining food sovereignty, investing in conventional systems and ensuring fair trade conditions.

**Trade policy** already illustrates what a competitiveness-first mindset can deliver. In June the EU replaced the emergency Autonomous Trade Measures for Ukraine with a balanced, trigger-based system of tariff-rate quotas, an arrangement secured through intensive AVEC engagement which protects EU farmers while maintaining Europe’s solidarity. We are now turning our attention to Mercosur, where we continue to call for verifiable mirror clauses before extra market access is granted.

Beyond geopolitics, AVEC has strengthened its reputation as a solutions-based partner with regard to animal health and welfare. Confronted with a draft Commission regulation on **Animal Welfare on Transport**, our members gathered field data from Spain, France and Hungary that translated emotive debate into measurable welfare outcomes, helping

legislators focus on what truly improves bird comfort. Our sector has also turned **vaccination** against highly pathogenic avian influenza from theory into practice: France is now in its second campaign for ducks, while trials in the Netherlands, Italy and Hungary are extending protection to layers, turkeys and geese. These advances not only reduce the risk but also provide the EU with leverage when negotiating science-based regionalisation with trading partners.

Alongside these headline issues, AVEC and its members continue the equally vital work of safeguarding consumer trust by sharing **best practices** and pushing for harmonised life-cycle assessment methods so that future footprint labels inform shoppers without distorting competition.

All these achievements stem from a distinctive way of working: **one clear voice, grounded in evidence, relentlessly focused on feasible outcomes**. The road ahead will bring challenges. Yet with the policy compass now aligned with our own, AVEC will continue to work towards a resilient, sustainable future for European poultry.



**Birthe Steenberg**  
Secretary General

A handwritten signature in blue ink, appearing to read 'Birthe Steenberg'.



**Gert-Jan Oplaat**  
President

A handwritten signature in blue ink, appearing to read 'Gert-Jan Oplaat'.

## Future priorities

- Defend the EU poultry sector by advocating a sustainable and viable production.
- Deliver the 2025 competitiveness study, providing policymakers with facts on poultry production.
- Secure fair trade demanding reciprocity.
- Shape animal welfare rules that work on the ground.
- Stay ahead of avian influenza and animal diseases.
- Lead on food safety.
- Drive on sustainability pushing for realistic market-aligned policies.
- Unlock innovation using EU projects.



# Who we are





# Our association

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AVEC was established in 1966 as a voluntary, non-profit organisation to represent and promote the interests of the European poultry sector.

In 2005 the association moved its headquarters from Denmark to Brussels to be closer to the European institutions and to facilitate better engagement with EU policy makers and stakeholders.

Through the work of its secretariat, AVEC follows developments in international trade and market conditions, seeking solutions to common issues and acting as a trusted adviser to its member organisations.

**The AVEC secretariat is based in Brussels, with five employees:**



**Birthe Steenberg**  
Secretary General



**Paul-Henri Lava**  
Deputy Secretary General



**Nadia Khaldoune**  
Senior Policy Adviser



**Federica Chiarella**  
Project Manager



**Maria Nikolaidi**  
Communications Manager



# The Presidency and the Board

Gert-Jan Oplaat has been the **President** of AVEC since September 2022. An entrepreneur, director and politician in the Netherlands, he is a member of the Dutch Senate and President of the Association of the Dutch Poultry Processing Industry (NEPLUVI).



**Gert-Jan Oplaat**  
President

The president chairs the board meetings and the general assembly, participates in the different working groups and supports the secretariat in its daily work.

Gert-Jan Oplaat is assisted by four **vice-presidents**:



**Dariusz Goszczyński**  
KRD-IG (Poland)



**Franz-Josef Rothkötter**  
BVG (Germany)



**Iokin Zuloaga**  
Avianza (Spain)



**Mario Veronesi**  
Unaitalia (Italy)

AVEC's **member organisations** are each represented by one board member and one deputy board member. Board meetings are held four times a year.

AVEC's annual general assembly takes place during September or October and brings together more than 150 delegates. Industry stakeholders and EU institution speakers are invited to give their views on current issues.

## Board members 2024-25

Country	Board member	Deputy board member
AUSTRIA	Harald Schliessnig	Stefan Weber
BELGIUM	Philip Eeckman	Ann Truyen
DENMARK	Stig Munck Larsen	Michael Juhl Jørgensen
FINLAND	Riitta Rahkila	Petri Toivola
FRANCE	Philippe Gélín	Yann Brice
GERMANY	Franz-Josef Rothkötter	Wolfgang Schleicher
HUNGARY	Dr. Attila Csorbai	György Endrödi
ITALY	Mario Veronesi	Lara Sanfrancesco
LATVIA	Anna Erliha	Saulius Petkevičius
NETHERLANDS	Gert-Jan Oplaat	Mark den Hartog
POLAND	Dariusz Goszczyński	Zbigniew Idziaszek
PORTUGAL	Avelino Gaspar	Dinis dos Santos
ROMANIA	Ilie Van	Ovidiu Oprita
SLOVENIA	Enver Šišić	Janez Rebec
SPAIN	Iokin Zuloaga	Jordi Montfort
SWEDEN	Maria Donis	Mats Hedlund
UNITED KINGDOM	Euan Meldrum	Richard Griffiths

# Our members

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Our members include national organisations representing poultry producers and the poultry trade in 16 EU Member States and the UK.

## AUSTRIA

**QGV – Austrian Poultry Health Service**

Phone: +432272/82600-12  
E-mail: office@qgv.at  
www.qgv.at

## BELGIUM

**V.I.P. – België: Vereniging van Industriële Pluimveeslachterijen**

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

## DENMARK

**Danish Poultry Meat Association**

Phone: +45 33 39 40 00  
E-mail: bsb@lf.dk  
www.danskfjerkrae.dk

## FINLAND

**The Finnish Poultry Processing Industries Association**

Phone: +358 9 14 88 71  
E-mail: mari.lukkariniemi@etl.fi  
www.siipi.net/en/siipikarjaliitto

## FRANCE

**CIDEF – Comité Interprofessionnel de la Dinde**

Phone: +33 2 99 60 31 26  
E-mail: cidef@dinde.fr  
www.dinde.fr

## FRANCE

**Fédération des Industries Avicoles (F.I.A.)**

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E-mail: contact@fia.fr  
www.fia.fr

## GERMANY

**Bundesverband der Geflügelschächtereien e.V.**

Phone: +49 30 28 88 31 10  
E-mail: bvg@zdg-online.de  
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## HUNGARY

**BTT – Baromfi Termék Tanács**

Phone: +361 269 2998  
E-mail: titkarsag@magyarbaromfi.hu  
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## ITALY

**UNAITALIA – Unione Nazionale Filieri Agroalimentari Delle Carni e Delle Uova**

Phone: +39-0645541050  
E-mail: unaitalia@unaitalia.com  
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## LATVIA

**Latvian Egg and Poultry Producers Association**

Phone: +371 26147764  
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www.poultry.lv

## NETHERLANDS

**NEPLUVI**

Phone: +31 30 63 55 252  
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www.nepluvi.nl

## POLAND

**KRD – Krajowa Rada Drobiarstwa – Izba Gospodarcza**

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## PORTUGAL

**ANCAGE – Associação Nacional dos Centros de Abate e Indústrias Transformadoras de Carne de Aves**

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## ROMANIA

**UCPR – Uniunea Crescătorilor de Pasari din Romania**

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## SLOVENIA

**GIZ Mesne Industrije Slovenije**

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## SPAIN

**AMACO**

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## SPAIN

**AVIANZA**

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E-mail: avianza@avianza.org  
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## SWEDEN

**Svensk Fågel**

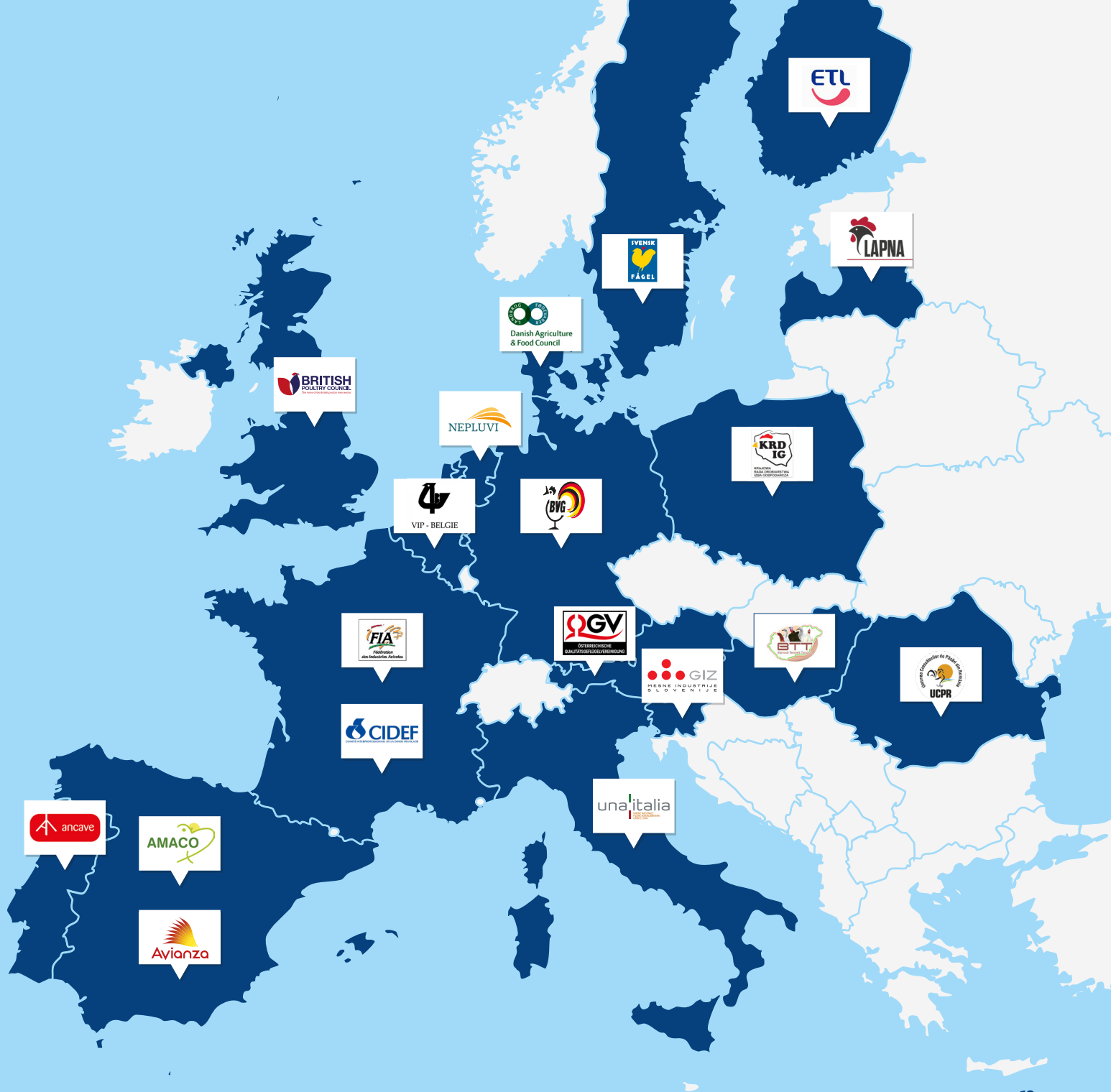
Phone: +46 8 787 55 20  
E-mail: maria.donis@svenskfaegel.se  
www.svenskfaegel.se

## UNITED KINGDOM

**BPC – British Poultry Council**

Phone: +44 203 544 1675  
E-mail: info@britishpoultry.org.uk  
www.britishpoultry.org.uk





# AVEC working groups

AVEC's work is structured around a series of working groups, where technical discussions result in positions that serve to advise the board and tackle some of the most important matters for the European poultry meat sector. AVEC's permanent working groups cover the following key areas:



**Animal health and welfare:** improving and protecting the health and welfare of European poultry raised for slaughter.



**Food safety and food quality:** defending food safety standards across Europe and bringing quality products to the table that consumers can trust.



**Sustainability:** striving to increase efficiency of production, address the challenges of climate change and establish balance between the environmental, social and economic pillars of sustainability to guarantee the sector's viability.



**Trade:** securing political guarantees for fair competition and a level playing field for EU producers and ensuring the interests of the EU poultry meat sector are defended in trade negotiations.



**Communication:** enhancing the organisation's outreach and engagement through strategic communication initiatives, fostering collaboration and effectively disseminating information about the EU poultry sector.



**Turkey:** addressing a broad range of issues related to turkey farming in Europe (including trade and sustainability), developing comprehensive farm management guidelines, tackling regulatory challenges and overall supporting the turkey meat sector.



**Duck:** launched in 2024, the Duck working Group addresses a broad range of issues related to duck farming in Europe, tackling regulatory challenges and overall supporting the duck sector.



# EU and international key partners

AVEC collaborates with a wide range of international organisations addressing various issues within the agri-food sector.

We maintain regular contact with other stakeholders, particularly within the meat sector, facilitating the exchange of views and insights on technical and strategic matters. This ongoing dialogue is invaluable, ensuring that AVEC stays at the forefront of developments and best practices.



AVEC is a founding member of the [European Livestock Voice \(ELV\)](#), a multi-stakeholder group of 14 partners in the livestock food chain. Representing sectors from animal health to feed and farming, ELV is

dedicated to informing policy makers and the public about the societal value of livestock production and its role in addressing global challenges.



AVEC is also a founding charter member of the [International Poultry Council \(IPC\)](#), an organisation bringing together national sector associations, poultry businesses and other key industry stakeholders from around the world to address issues of trade, science and improved relations among nations. IPC is the voice of the global poultry meat industry.

## ELPHA and EPB

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



ELPHA represents and promotes the European live poultry sector, advocating for its interests in live poultry and hatching egg policies within European institutions. Its members are primarily focused on EU trade, animal health, animal welfare, and genetics. ELPHA also acknowledges that food safety and security begin with the high-quality production of live poultry.

Visit the new ELPHA website: [www.elpha.eu](http://www.elpha.eu)



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



**Wout Van Wolfswinkel**  
President of ELPHA



**Gérard Lévêque**  
President of EPB





# What we do

*An overview of the main themes AVEC has worked on during 2024-2025. You will find a general description of the issues, combined with a brief outline of AVEC's positions in relation to each one, highlighting the strategy for future actions.*







# Animal health and animal welfare

Over the past year, the AVEC working group on animal health and welfare was joined by members from ELPHA, the European Live Poultry and Hatching Egg Association. As a member of the EU Commission subgroup on policy indicators, ELPHA actively participated in the listing and discussion of animal welfare policy indicators pertaining to broilers and laying hens.

**“The primary focus during this period was the Commission proposal on the welfare of animals during transport.”**

On the issue of the revision of the legislation on animal welfare during transport, our Spanish member's impact assessment was followed by a study commissioned by the French sector to assess the economic impact of implementing the proposed rules. Separately, our Hungarian member tested the proposal through two parallel transport trials, measuring the direct impact on the welfare of broilers. These three case studies were instrumental in supporting the secretariat in promoting best practices and questioning the Commission's proposal. Although the



**Harald Schliessnig**  
Animal Health and Animal  
Welfare Working Group Chair

Commission can withdraw its proposal at any time, the text is now officially in the hands of the EU Parliament and the EU Council. With over 3.000 amendments proposed by MEPs, opinions vary widely, ranging from outright rejection to substantial modifications of the original text. At AVEC, we must continue our collaboration with the EU Council and key players in the EU Parliament.

Turning to animal health, this was another year marked by growing concerns over the expansion of highly pathogenic avian influenza (HPAI) at the global level. The numerous outbreaks and the constant presence of the virus have intensified discussions around vaccination, which now appears to have a more favourable outlook since the USA has lifted trade restrictions on French products. However, it is a source of great concern that Brazil has recently declared an HPAI case, putting the global market at risk of disruption. In the Netherlands, Hungary and Italy, trials are ongoing to better understand and mitigate the impact of HPAI.



Scan the QR code to read the full position presentation



## Future priorities

- Monitor discussions at the European Parliament and Council on the Commission proposal regarding the welfare of animals during transport. Advocate for sustainable and economically viable transport practices for our sector.
- Actively promote outcome-based welfare indicators and continuous improvement.
- Monitor outbreaks of HPAI, assess national vaccination plans and promote fair trade under vaccination.
- Keep a close eye on cases of HPAI in mammals and the global market, particularly with the recent declaration of HPAI in Brazil.



# Food safety and food quality

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## Achievements

AVEC's food safety and food quality working group brings together quality managers and food safety experts from poultry slaughterhouses and processing plants across Europe. During 2025, these experts looked at contaminants, consumer information, and quality of poultry meat. They shared information and best practices to improve food safety, food quality and, ultimately, the sustainability of poultry meat. The group's members also have a focus on fair competition with the world's biggest trading blocs and aim to promote and apply our standards to imported products.

## Management of contaminants

2025 was an important year for biological contaminants, and especially *Campylobacter*, with a new threshold on the hygiene criteria for raw chicken meat that came into effect on 1 January. The Food safety and food quality working group continues to gather and share the latest scientific developments in collaboration with research institutes. Its members are also encouraged to share best practices along the chain, from primary production (farms) to final consumer (fork), in order to comply with the new limits in every country.



**Julie Bret-Mayot**

Food Safety and Food Quality  
Working Group Chair

Anticipating new regulations on chemical contaminants at the EU level, the working group has paid particular attention to MOSH and MOAH (mineral oils) in foodstuffs. To anticipate contamination issues, members have tested for these contaminants, and AVEC has engaged with the Commission and other key stakeholders on this topic.

Modifications to Regulation 2073/2005 regarding *Listeria monocytogenes* was discussed by the experts in the working group. This provided an opportunity to share national practices on ready-to-eat products, both from a safety point of view and also with regard to product labelling.

## Research projects

AVEC is one of the official partners of the EU-funded research project [BREADCRUMB](#), which is evaluating the impact of various marketing standards on levels of food waste generation. As part of this, we are highlighting the need for the interpretation and implementation of EU rules on the classification of animal by-products to be reconsidered. Our members have participated in a survey and interviews aimed at identifying the sources of waste, along with solutions to reduce them.



**“The Food safety and food quality working group has also contributed to several research projects under the Horizon Europe programme.”**

By joining expert panels and advisory committees, AVEC ensures the expertise and knowledge of our sector feeds into Horizon research projects and scientific studies, fostering a realistic and pragmatic approach, as well as a more sustainable food production system.

## Future priorities

- Monitor and follow developments on the revision of the regulation on marketing standards.
- Advocate for clearer guidelines, especially on labelling.
- Call for revised thresholds and parameters to control water content.
- Monitor discussions on origin labelling.
- Promote the indication of origin (EU/non-EU) on both fresh and processed products in all distribution circuits, including out-of-home consumption.
- Protect meat denominations.
- Evaluate the implementation of new *Campylobacter* limits after one year.
- Continue monitoring biological and chemical contaminants in poultry meat.



# Sustainable production

**“ In 2024–2025, AVEC’s Working group on sustainable production remained the primary strategic forum for members to exchange knowledge and shape common responses to the EU’s evolving sustainability framework. ”**

The group focused on methodological harmonisation, regulatory simplification, and effective communication of the sector’s progress, while also contributing to broader EU-level initiatives.

## Achievements

A central focus this year was illustrating the need for harmonised methodologies in life cycle assessment (LCA) for poultry meat. A scientific review by a PhD student at the University of Bologna and a case-based analysis by a private consultant both highlighted how divergent approaches (from system boundaries to allocation methods) can lead to discrepancies of up to 40% in carbon footprint results. These inconsistencies create unnecessary complexity and limit the comparability of initiatives across the EU. Members agreed that AVEC should focus on ensuring consistency among national LCA initiatives in order to support both transparency and competitiveness.



**Saulius Petkevicius**  
Sustainable Production  
Working Group Chair

The working group also reviewed the AVEC Sustainability Charter to confirm that its objectives reflected current field realities and member initiatives. Manure management, biodiversity and nutrition were identified as priority areas for strengthening the charter. Stronger collaboration with the Communication working group was recommended to highlight practical progress and raise public awareness of the sector’s sustainability efforts.

Another key topic related to the revision of the Industrial Emissions Directive (IED), and the participation of AVEC in the group discussing Uniform Conditions for Operating Rules for Livestock (pig and poultry). AVEC is coordinating national responses, as well as engaging in discussions at EU level to ensure the implementation is balanced in order to avoid additional burdens relating to the control and monitoring of environmental emissions at farm level.

More generally, members have expressed growing concerns about the administrative burden of environmental regulations, particularly the Corporate Sustainability Reporting Directive (CSRD) and the new EUDR (EU deforestation regulation). We have called for greater flexibility, clear impact assessments, standardised reporting tools, and better access to data, especially for small operators.

The situation has been made more complex because stakeholders including retailers, NGOs and public authorities all require sustainability data, but often in different formats and to conflicting timetables. This lack of coordination means that many companies are unsure about what information is ultimately required and how it should be reported. Closing that gap and steering the EU towards a more streamlined sustainability reporting framework therefore remains a core priority.

## Future priorities

- Try to harmonise the way LCAs are performed for poultry meat production.
- Champion the sector in the discussions on the new EU livestock strategy (Livestock Workstream), advocating to keep poultry farming both sustainable and competitive by investing in efficient conventional systems, securing practical support on renewable energy and animal-health programmes, ensuring fair trade rules and demanding coherent policies that don't disadvantage EU producers.
- Improve access to CAP funding, especially for sustainability-related investments across the value chain.
- Explore circular-economy solutions such as the role of poultry manure for biogas.
- Push for realistic, market-aligned policies that recognise the structural diversity of the sector.





# Trade

**“A combination of geopolitical tensions, trade diversion and disruption is likely to pose uncertainty for the poultry meat sector in the years ahead.”**

Over the past year, much of the discussion about trade has been focused on defensive poultry meat interests in response to the political agreements on further trade liberalisation with Mercosur countries and Ukraine. The revision of Article 29 of the EU- Ukraine Deep and Comprehensive Free Trade Area (DCFTA) has led to the increase of the quantity of the existing Tariff Rate Quotas (TRQ) for imported poultry meat from Ukraine from 90 000 T to 120 000 T; while this will bring long-term certainty and stability to our trade relations, we deplore this 33 % increase of the TRQ for a sensitive sector like poultry meat.

Greater clarity is needed on how conditionality – particularly in relation to production standards – will be implemented. While Ukraine’s legislative alignment with EU rules is a positive step, especially in the context of the accession process, enforcement under wartime conditions presents serious limitations. Transposing legislation is one thing; ensuring effective implementation and compliance on the ground is quite another. Since the start of the year, trade policy and the risk of a global trade war, with associated high tariffs, has pushed global trade in the direction of uncertainty and disruption. Combined with high levels of HPAI outbreaks globally (now also including Brazil), risks to supply imbalances and trade diversions have increased yet further.



**Stig Munk Larsen**  
Trade Working Group Chair

The new EU Commission has launched a work programme for the next five years which will focus on competitiveness, while also continuing to develop the previous programme on climate and sustainability. The global focus on food security and self-sufficiency, combined with signs of higher level of trade protectionism, has moved the EU in a new direction. There is a greater focus on defending EU industries against unfair trade practices in third countries, and in speeding up negotiations on free trade agreements. AVEC is supportive of a pragmatic approach to trade, underpinned by reciprocity in trade and production requirements that align with EU legislation. This has been clearly underlined in the EU Commission’s work programme.

There is widespread support for Ukraine and its application for EU membership, although this will be underpinned by further development in trade with the EU, which will of course involve complying with EU rules on, for example, animal welfare and environmental measures to restore fair and equal competition.

Exports of poultry meat from the EU have been impacted by numerous outbreaks of HPAI, although there have been increasing benefits from regionalisation agreements with third countries. Exports are still faced with non-tariff barriers which should be eliminated in future free trade agreements with key countries, especially in Asia. In China, a lack of recognition of the EU as a single entity has resulted

in market access being limited to a few countries and based on bilateral agreements. Reciprocity should apply, as China today exports significant volumes of poultry meat products to the EU. Also, countries like Japan, Vietnam and the Philippines are imposing export barriers or delay agreements on regionalisation as agreed in WOH (World Organisation for Animal Health) despite the current need for imports of poultry meat. A cornerstone is to ensure better progress in the implementation of market access as agreed in free trade agreements with Canada and Mexico. Here, too, exports are facing an unwillingness by participants to implement agreements in a timely manner.

## Future priorities

- Ensure reciprocity and fair competition in trade agreements.
- Defend the sector against unfair trade practices and rising protectionism.
- Push for full implementation of existing FTAs (e.g. Canada, Mexico).
- Anticipate and shape trade relations in the context of Ukraine's EU accession.
- Support export resilience through regionalisation and diversification.



# Turkey

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On 28 September 2023, the European Commission officially commissioned EFSA to provide a scientific opinion on the welfare of turkeys on farms. As part of this initiative, the Commission conducted fact-finding visits to France, Italy and Germany. The purpose of these was to gain an understanding of the best practices and regulatory frameworks in place with regard to turkey production.

The results were very positive. The auditors commended the expertise and professionalism of the operators, noting that the national authorities had effectively transposed animal welfare legislation and EU rules on keeping animals for meat production with some additional requirements. The turkey industry demonstrated a high level of integration, operating with significant professionalism and oversight. Operators were observed to regularly monitor production parameters related to turkey welfare, ensuring that high standards were maintained.

Looking ahead, we are committed to continuing our efforts to shape the future of turkey production in Europe. During its last meeting, the working group decided to organise a workshop to brainstorm on the future of turkey meat. This symposium, scheduled for 30 October 2025,



**Yann Brice**

Turkey Working Group Chair

**“ Looking ahead, we are committed to continuing our efforts to shape the future of turkey production in Europe. ”**

will look at defining optimal consumer and market strategies to ensure that turkey not only remains competitive with other meats, but also acquires a stronger position in the EU market overall. Attendees will engage in discussions aimed at crafting a forward-looking strategy for the turkey sector, with insights from international perspectives, including speakers from Russia and Morocco. The symposium will provide a platform for industry stakeholders to collaborate, share best practices, and innovate, ensuring the sustained growth and competitiveness of the turkey sector.





## Future priorities

- Continuous improvement in animal welfare: we will continue to monitor and enhance our animal welfare practices.
- Market strategy development: we will focus on developing robust market strategies that position turkey meat favourably against other proteins, ensuring its competitiveness and market penetration.
- International collaboration: we will seek to collaborate with international partners to gain insights and share best practices, fostering a global perspective on turkey production.

# European projects

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## MOZART

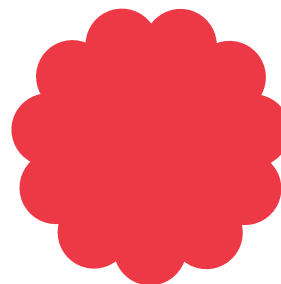
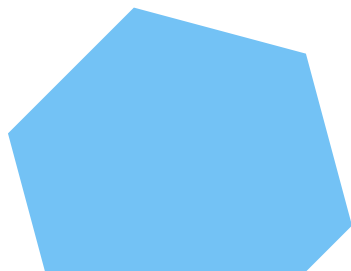
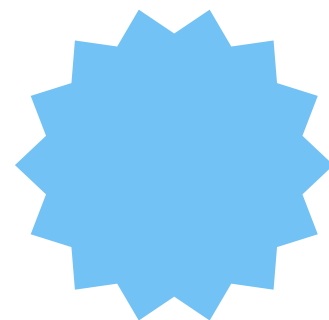
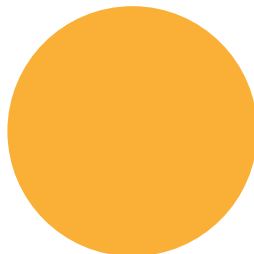
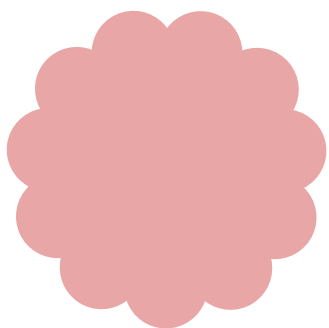
AVEC's first partnership with a research and innovation programme began in October 2022 with the launch of MOZART (Morphing Computerized mats with Embodied Sensing and Artificial Intelligence). This is a Horizon Europe initiative within the 'Research and Innovation - Artificial Intelligence, Data and Robotics for the Green Deal' call. MOZART is being coordinated by the IT University of Copenhagen (ITU) and brings together eight stakeholders from five Member States. MOZART aims to advance the state of the art in robotic handling of soft and heterogeneous objects, which is currently limited to simple pick-and-place operations. Using chicken leg and fish case studies, MOZART is developing a new approach based on novel reconfigurable surfaces equipped with soft sensors and controlled by AI-powered learning tools: Autonomous Manipulation using Morphing Modular Mats (AUTOMATs).

Within MOZART, AVEC contributes significantly to the communication, dissemination and exploitation of the project's activities and results. As the project approaches its conclusion next year, the outcomes and technological advancements will be presented and shared with AVEC stakeholders. Stay tuned for further updates.

Discover more on the MOZART website:

<https://mozart-robotics.eu/>

# MOZART



# BREADCRUMB

The purpose of the BREADCRUMB project is 'Bringing evidence-based food chain solutions to prevent and reduce food waste related to marketing standards, and deliver climate and circularity co-benefits'. Launched in January 2024 with €5 million in funding from Horizon Europe Cluster 6: Food, Bioeconomy, Natural Resources, Agriculture and Environment, BREADCRUMB is coordinated by EV-ILVO (Belgium) and unites 21 partners from seven EU countries for a 36-month duration. BREADCRUMB aims to develop practical tools and guidelines tailored to food chain actors, increasing the business potential of suboptimal food products and encouraging their placement on the market to prevent food waste.

Within the meat case study, AVEC, alongside FEBEV (Belgian beef and pork) and FENEVIAN (Belgian processed meat), plays an active role in data collection, communication, and operational tasks. Analysis combining quantitative and qualitative methods revealed that food waste due to marketing standards in the poultry sector is minimal, averaging 1.01% for whole chicken, 0.31% for breast fillet, and 0.56% for chicken legs.

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<https://www.breadcrumb-project.eu/>



# BREADCRUMB







# Statistics

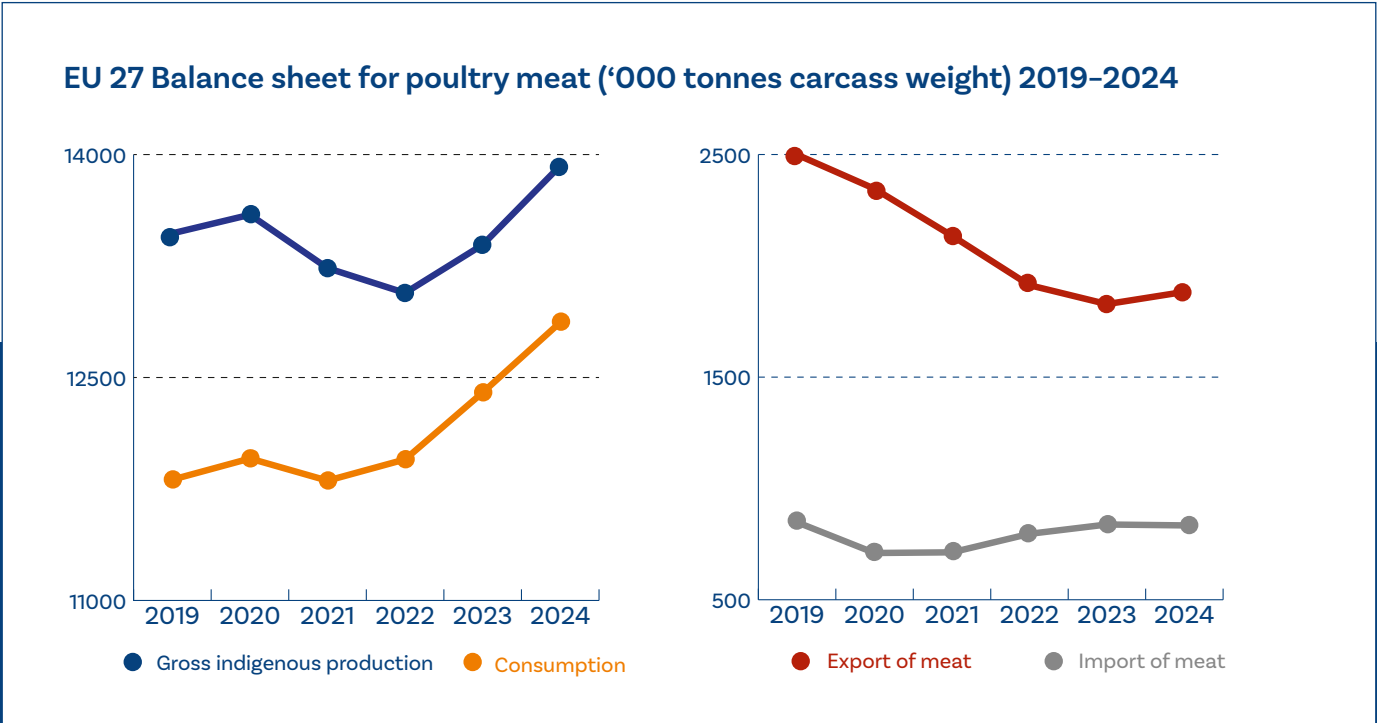


# Statistics

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

	2019	2020	2021	2022	2023	2024
	EU 27	EU 27	EU 27	EU 27	EU 27	EU 27
Gross indigenous production	13,470	13,595	13,236	13,069	13,393	13,925
Export of meat	2,499	2,346	2,135	1,913	1,828	1,883
Import of meat	848	710	713	796	838	834
Consumption	11,813	11,955	11,806	11,949	12,399	12,871
Consumption per capita, kg	23.2	23.5	23.2	23.4	24.2	25.1
Self-sufficiency, %	114	114	112	109	108	108

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





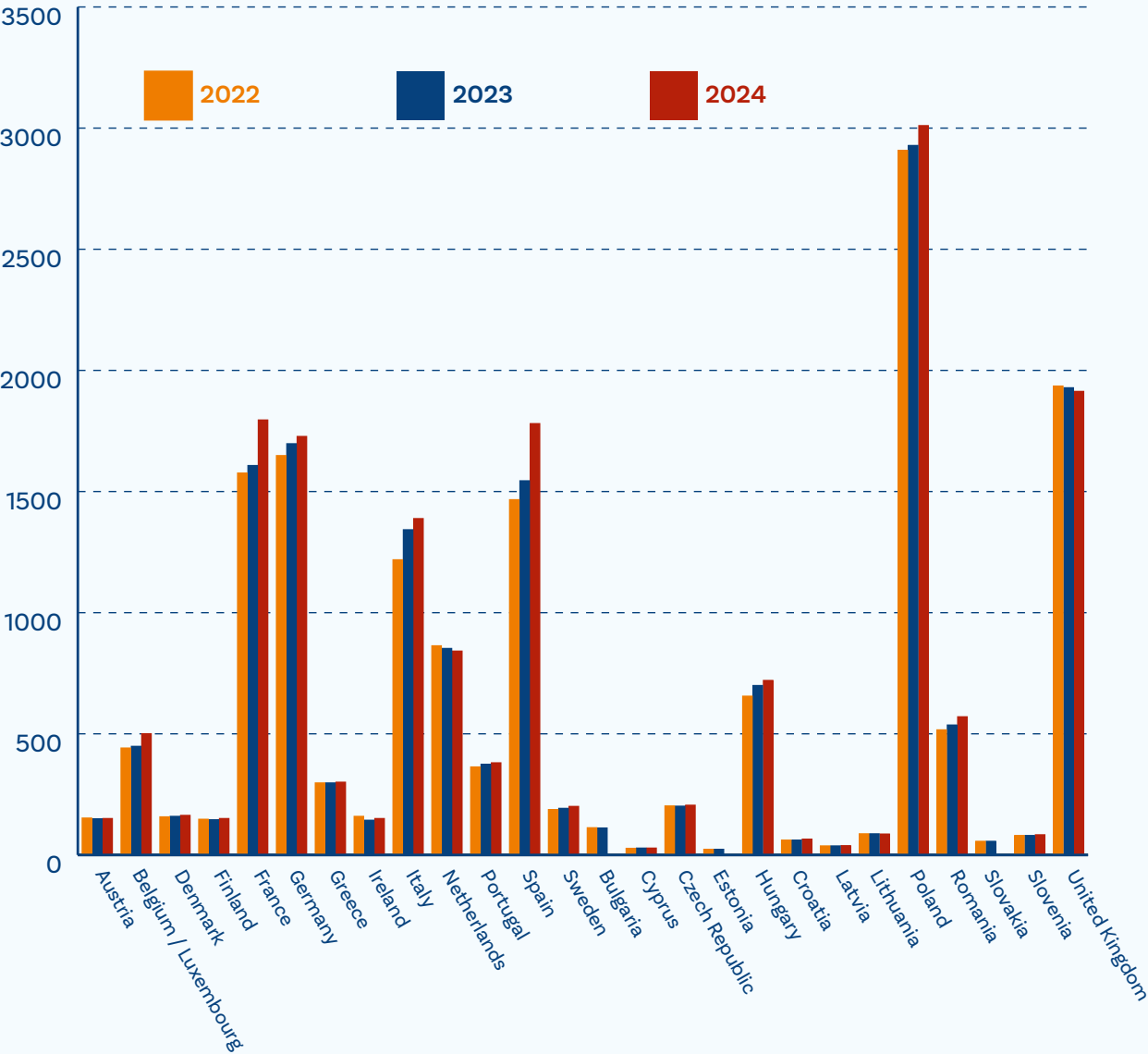
## 2. Gross domestic production of poultry meat in the EU& UK ('000 tonnes carcass weight)

	2019	2020	2021	2022	2023	2024
Austria	134	144	150	152	149	150
Belgium / Luxembourg	417	448	449	441	448	500
Denmark	169	165	162	157	159	163
Finland	140	142	147	147	145	150
France	1,790	1,733	1,684	1,576	1,607	1,795
Germany	1,763	1,743	1,691	1,648	1,697	1,727
Greece	230	240	270	297	297	300
Ireland	154	166	163	159	143	150
Italy	1,324	1,390	1,374	1,218	1,342	1,388
Netherlands	1,036	996	869	863	852	841
Portugal	348	349	359	363	374	380
Spain	1,392	1,420	1,374	1,466	1,544	1,780
Sweden	160	172	182	187	192	200
Bulgaria	109	102	102	112	111	.
Cyprus	27	27	27	27	28	28
Czech Republic	196	200	200	202	201	205
Estonia	20	22	23	23	23	.
Hungary	688	666	719	655	699	720
Croatia	68	70	71	61	61	65
Latvia	35	35	35	37	37	38
Lithuania	100	101	87	87	87	86
Poland	2,863	2,981	2,762	2,908	2,928	3,010
Romania	507	487	490	516	536	570
Slovakia	71	58	56	56	56	.
Slovenia	70	76	80	80	80	83
<b>EU 27</b>	<b>13,814</b>	<b>13,936</b>	<b>13,531</b>	<b>13,441</b>	<b>13,798</b>	<b>14,457</b>
United Kingdom	1,816	1,849	1,904	1,935	1,928	1,913
<b>EU 28</b>	<b>15,704</b>	.	.	.	.	.

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

**Sources:** MEG according to EU Commission, national data, FAO and EUROSTAT.

Gross domestic production of poultry meat in the EU & UK (2022-2024)



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

	2019	2020	2021	2022	2023	2024
Argentina	2,203	2,221	2,247	2,273	2,317	2,354
Brazil	14,203	14,179	14,267	14,422	14,708	14,947
Chile	768	781	800	815	827	839
China	22,390	23,610	23,984	24,228	23,447	23,682
India	4,231	3,821	3,650	3,812	3,972	4,135
Japan	1,633	1,678	1,677	1,673	1,656	1,655
Mexico	3,480	3,605	3,643	3,679	3,742	3,805
Russia	4,573	4,610	4,634	4,652	4,676	4,706
Saudi Arabia	804	933	990	1,063	1,108	1,139
Switzerland	103	107	112	115	113	119
South Africa	1,823	1,973	2,038	2,104	2,164	2,223
Turkey	2,270	2,339	2,412	2,468	2,516	2,563
Ukraine	1,153	1,253	1,317	1,378	1,416	1,441
USA	22,341	22,582	22,633	22,854	23,028	23,347
<b>World Production</b>	<b>131,938</b>	<b>133,574</b>	<b>135,071</b>	<b>137,280</b>	<b>138,413</b>	<b>140,621</b>

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

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



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

	2019	2020	2021	2022	2023	2024	2024 from third countries - EU 27
<b>Poultry Meat<sup>1</sup></b>							
Austria	108	96	104	115	115	155	19
Belgium / Luxembourg	297	279	305	305	261	228	23
Bulgaria	112	100	93	94	103	102	1
Croatia	22	18	21	24	29	32	2
Cyprus	12	10	12	14	17	18	1
Czech Republic	110	113	104	124	136	153	1
Denmark	79	75	63	64	55	60	1
Estonia	22	21	22	23	25	25	0
Finland	8	8	7	9	11	15	0
France	458	437	524	557	576	578	42
Germany	721	679	695	692	701	695	11
Greece	84	72	82	85	89	90	2
Hungary	68	78	71	85	101	58	0
Ireland	77	67	65	86	86	83	23
Italy	67	68	74	123	87	94	1
Latvia	44	45	44	40	40	42	0
Lithuania	42	47	46	42	47	46	2
Malta	6	6	5	5	6	8	0
Netherlands	588	570	696	777	865	830	189
Poland	89	63	78	69	59	50	0
Portugal	73	67	67	73	86	98	3
Romania	122	134	124	117	116	122	8
Slovakia	102	77	59	86	122	138	24
Slovenia	20	18	17	20	23	24	1
Spain	151	137	138	160	184	204	34
Sweden	58	53	57	70	72	72	0
United Kingdom	434	.	.	.	.	.	.
<b>EU 28 from third countries</b>	<b>215</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>
<b>EU 27 from third countries</b>	<b>468</b>	<b>392</b>	<b>375</b>	<b>376</b>	<b>406</b>	<b>388</b>	<b>.</b>
<b>Salted meat<sup>2</sup></b>							
Germany	30	31	35	40	37	29	12
Netherlands	154	134	142	148	147	157	154
United Kingdom	45	.	.	.	.	.	.
<b>EU 28 from third countries</b>	<b>204</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>
<b>EU 27 from third countries</b>	<b>177</b>	<b>157</b>	<b>160</b>	<b>169</b>	<b>171</b>	<b>171</b>	<b>.</b>
<b>Preparations of poultry<sup>3</sup></b>							
<b>EU 28 from third countries</b>	<b>338</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>
<b>EU 27 from third countries</b>	<b>178</b>	<b>155</b>	<b>146</b>	<b>191</b>	<b>187</b>	<b>211</b>	<b>.</b>

**Note:** 1) Without preparations, livers, salted meat and live poultry. - 2019 partly preliminary. - Data in the EUROSTAT trade statistics and trade balance are partial different.

2) tariff 0210 99 39, almost exclusively poultry. 3) tariff items 1602 31 .. 1602 32 .. and 1602 39 ..

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

## 5. Export of EU countries of poultry meat ('000 tonnes carcass weight)<sup>1</sup>

	2019	2020	2021	2022	2023	2024	2024 to third countries - EU 27
Austria	65	67	72	69	69	93	1
Belgium / Luxembourg	511	517	542	479	461	503	12
Bulgaria	43	32	35	38	34	32	3
Croatia	8	8	11	11	11	10	7
Cyprus	1	1	1	1	1	1	1
Czech Republic	18	16	19	28	24	25	1
Denmark	88	81	69	84	80	81	24
Estonia	9	8	9	8	9	10	0
Finland	14	14	13	11	7	9	3
France	362	326	360	354	304	324	13
Germany	475	415	427	495	439	410	48
Greece	35	34	42	44	45	47	17
Hungary	235	204	244	219	241	220	50
Ireland	107	103	63	72	64	61	33
Italy	167	163	174	129	164	174	54
Latvia	16	15	16	16	16	17	3
Lithuania	46	47	41	38	41	44	23
Malta	0	0	0	0	0	0	0
Netherlands	1,583	1,455	1,320	1,364	1,290	1,241	389
Poland	1,461	1,495	1,482	1,586	1,646	1,785	668
Portugal	27	25	37	34	37	38	11
Romania	75	75	79	82	91	105	28
Slovakia	37	22	22	29	49	36	3
Slovenia	23	21	25	24	26	26	7
Spain	241	215	246	210	214	222	79
Sweden	84	82	81	92	80	70	7
United Kingdom	383	.	.	.	.	.	.
<b>EU 28 to third countries</b>	<b>1,686</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>
which were							
Chicken	1,526	.	.	.	.	.	.
Turkey	133	.	.	.	.	.	.
<b>EU 27 to third countries</b>	<b>2,167</b>	<b>2,029</b>	<b>1,809</b>	<b>1,623</b>	<b>1,559</b>	<b>1708</b>	<b>.</b>
<b>Preparations of poultry <sup>2</sup></b>							
<b>EU 28 to third countries</b>	<b>54</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>
<b>EU 27 to third countries</b>	<b>245</b>	<b>247</b>	<b>245</b>	<b>262</b>	<b>271</b>	<b>265</b>	<b>.</b>

**Note:** 1) Without preparations, livers and salted meat. 2) tariff items 1602 31 .. 1602 32 .. and 1602 39 .. -

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

## 6. Foreign trade of third countries of poultry and chicken meat ('000 tonnes carcass weight)

	2019	2020	2021	2022	2023	2024
<b>Total imports of poultry meat</b>						
Switzerland	46	43	45	45	45	52
<b>Imports of broiler meat</b>						
Angola	266	213	263	353	210	.
China	580	999	788	633	756	510
Hong Kong	.	.	.	.	.	.
Iraq	493	468	388	485	529	550
Japan	1,076	1,005	1,077	1,101	1,063	1,130
Russian Federation	224	200	220	.	.	.
Saudi Arabia	601	618	615	594	564	600
United Arab. Emirates	.	358	384	356	375	385
<b>Exports of broiler meat</b>						
Argentina	155	155	183	194	144	170
Belarus	174	190	184	.	.	.
Brazil	3,811	3,875	4,226	4,447	4,767	4,900
Chile	131	136	133	.	.	.
China	428	388	457	532	554	680
Thailand	881	941	907	1,021	1,098	1,150
Turkey	408	442	563	646	459	335
Ukraine	409	428	458	419	428	445
USA	3,259	3,376	3,350	3,314	3,302	3,058

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



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

	2019	2020	2021	2022	2023	2024
Austria	20.9	21.0	21.5	21.8	22.3	22.5
Czech Republic	25.0	25.5	24.9	25.2	25.0	26.0
Denmark	27.6	27.3	26.7	25.0	24.0	25.5
Finland	24.3	24.4	25.5	26.2	26.7	27.6
France	28.3	28.4	28.4	28.2	29.1	31.8
Germany	20.0	20.6	20.2	18.8	19.9	20.6
Greece	20.2	20.0	21.0	22.0	23.0	25.0
Hungary	32.9	33.0	33.5	33.0	34.0	35.0
Ireland	35.0	35.0	36.0	37.0	37.6	38.0
Italy	20.3	21.7	21.5	20.5	21.3	22.2
Latvia	.	.	.	28.0	28.0	30.0
Lithuania	26.0	26.0	27.0	29.0	31.0	30.0
Netherlands	22.9	22.1	22.0	21.4	21.6	.
Poland	31.4	33.4	28.3	29.8	35.2	35.3
Portugal	28.4	38.0	37.8	38.8	39.0	40.0
Slovakia	22.0	21.5	20.0	24.0	27.0	29.0
Spain	29.5	31.1	29.9	29.0	30.0	32.0
Sweden	22.4	21.8	23.2	22.9	23.5	24.1
<b>EU 28</b>	<b>25.3</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>
<b>EU 27</b>	<b>23.2</b>	<b>23.5</b>	<b>23.2</b>	<b>23.4</b>	<b>24.2</b>	<b>25.1</b>
Switzerland	18.4	18.4	19.2	19.4	19.0	20.6
United Kingdom	29.8	.	.	.	.	.

**Note:** Partial provisional or estimated.

**Sources:** MEG according to EU Commission, national data, FAO and EUROSTAT.

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

	2019	2020	2021	2022	2023	2024
Austria	72	77	78	77	73	.
Czech Republic	75	74	76	76	72	69
Finland	96	98	98	101	98	97
France	89	88	87	81	89	91
Germany	106	102	101	106	102	100
Greece	80	82	82	99	93	93
Hungary	132	123	129	126	125	130
Ireland	98	102	101	103	.	.
Italy	108	107	108	100	105	103
Latvia	62	61	63	61	61	61
Lithuania	103	100	94	96	94	98
Netherlands	161	160	158	160	160	.
Poland	249	242	268	279	233	240
Slovakia	.	.	.	.	.	.
Spain	107	106	109	104	102	102
Sweden	117	116	110	121	115	108
<b>EU 27</b>	<b>114</b>	<b>114</b>	<b>112</b>	<b>109</b>	<b>108</b>	<b>108</b>
United Kingdom	97	.	.	.	.	.
<b>EU 28</b>	<b>106</b>	.	.	.	.	.

**Note:** Partial provisional or estimated.

**Sources:** MEG according to EU Commission, national data, FAO and EUROSTAT.

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

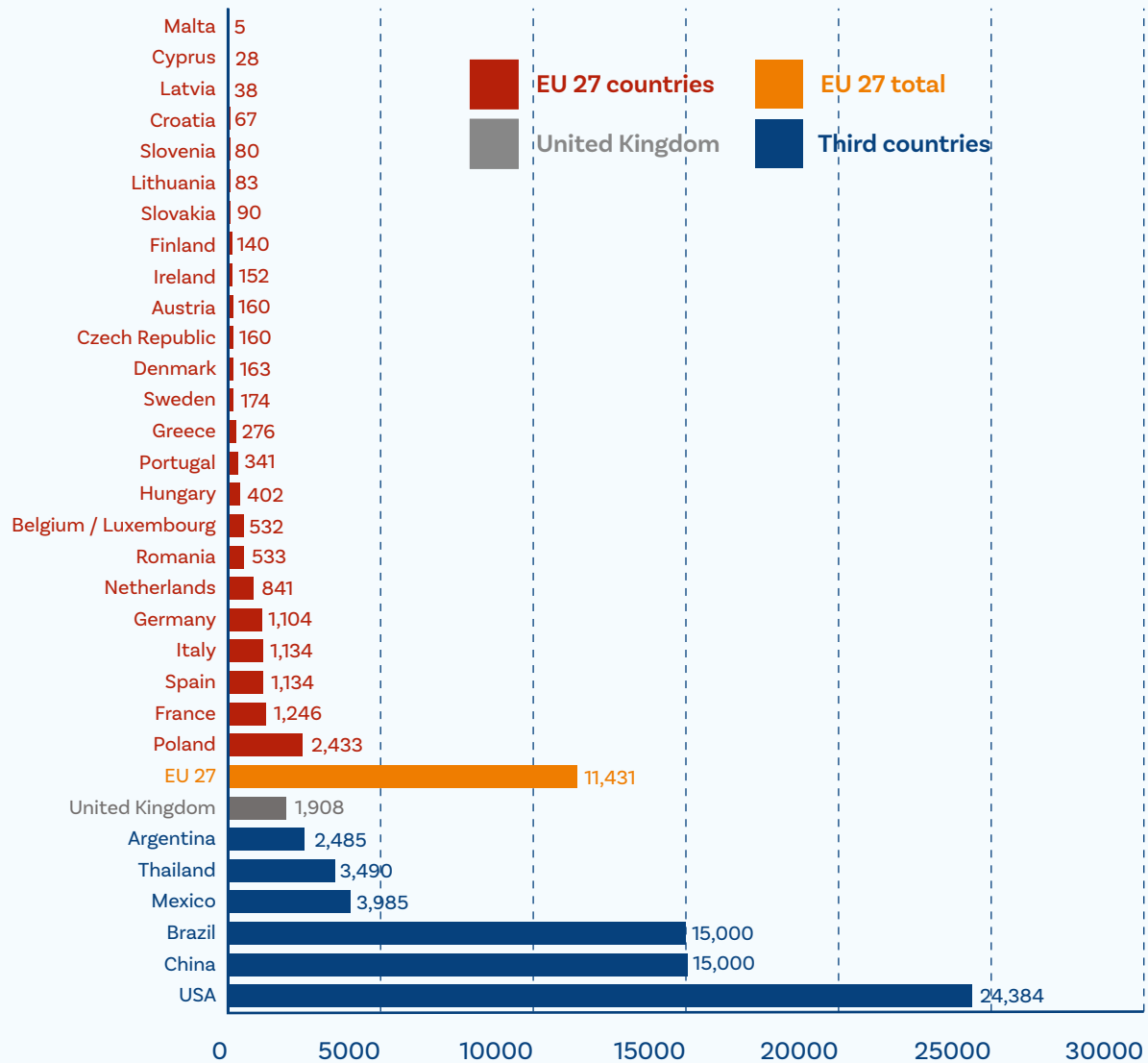
	2019	2020	2021	2022	2023	2024
Austria	150	150	150	147	150	160
Belgium / Luxembourg	440	441	448	442	421	532
Bulgaria	89	87	91	91	91	.
Cyprus	27	27	27	27	28	28
Czech Republic	159	161	168	161	159	160
Denmark	157	165	163	152	159	163
Estonia	20	22	23	23	24	.
Finland	132	135	139	138	135	140
France	1,121	1,130	1,143	1,114	1,128	1,246
Germany	1,043	1,074	1,089	1,079	1,090	1,104
Greece	228	237	236	245	272	276
Hungary	336	354	368	349	379	402
Ireland	141	152	148	145	149	152
Italy	1,055	1,067	1,069	994	1,083	1,134
Croatia	54	57	59	59	60	67
Latvia	35	35	35	37	37	38
Lithuania	97	97	85	84	83	83
Malta	4	4	4	4	5	5
Netherlands	1,036	996	869	864	850	841
Poland	2,111	2,200	2,097	2,232	2,285	2,433
Portugal	296	297	300	314	323	341
Romania	415	400	452	475	501	533
Slovakia	80	80	81	86	86	90
Slovenia	64	67	67	68	70	80
Spain	1,055	1,067	1,069	994	1,083	1,134
Sweden	154	167	180	167	167	174
<b>EU 27</b>	<b>10,497</b>	<b>10,671</b>	<b>10,556</b>	<b>10,491</b>	<b>10,816</b>	<b>11,431</b>
United Kingdom	1,709	1,779	1,841	1,847	1,858	1,908
<b>EU 28</b>	<b>12,892</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>
Argentina	2,203	2,219	2,294	2,319	2,436	2,485
Brazil	13,690	13,880	14,500	14,465	14,900	15,000
China	13,750	14,600	14,700	14,300	14,800	15,000
India	4,344	4,473	4,607	4,995	5,019	.
Indonesian	2,327	3,638	3,615	4,108	4,444	.
Iran	2,332	2,430	2,106	2,090	2,067	.
Mexico	3,600	3,596	3,665	3,763	3,888	3,985
Russia	4,606	4,577	4,617	5,308	5,340	.
South-Africa	1,395	1,537	1,570	1,577	1,515	.
Thailand	3,300	3,250	3,220	3,300	3,450	3,490
USA	19,941	20,255	20,391	20,993	21,082	24,384
<b>World</b>	<b>117,707</b>	<b>118,954</b>	<b>120,976</b>	<b>123,882</b>	<b>126,530</b>	<b>129,000</b>

**Notes:** Mainly provisional or estimated. Partly contradictory towards official information on poultry meat production.

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



## Broiler production in the EU and third countries ('000 tonnes carcass weight) in 2024



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

	2019	2020	2021	2022	2023	2024
Austria	15.0	15.1	15.4	15.8	16.9	.
France	20.1	20.7	21.6	22.6	23.3	25.2
Germany	13.3	13.9	14.1	13.2	14.3	14.9
Italy	.	.	.	.	.	.
Netherlands	21.4	20.6	20.4	20.0	20.2	.
Portugal	.	.	.	.	.	.
<b>EU 28</b>	<b>20.8</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>
United Kingdom	.	.	.	.	.	.
<b>EU 27</b>	<b>20.7</b>	<b>21.1</b>	<b>21.5</b>	<b>21.9</b>	<b>22.2</b>	<b>22.5</b>

Third Countries						
Argentina	44.9	44.8	46.7	47.1	50.5	50.8
Brazil	47.0	48.0	49.1	47.7	48.0	47.7
China	9.6	10.4	10.3	9.9	10.3	10.2
India	3.2	2.8	.	.	.	.
Japan	22.0	21.8	22.7	23.0	22.9	23.8
Mexico	35.5	34.9	35.8	36.3	37.7	37.8
South Africa	31.2	32.6	31.8	31.6	30.0	.
USA	49.4	50.1	50.5	51.8	52.0	53.3

**Note:** Partial provisional or estimated.

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

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

	2019	2020	2021	2022	2023	2024
Austria	.	16	18	18	17	17
Belgium / Luxembourg	8	7	7	6	7	.
Bulgaria	0	0	0	0	0	.
Croatia	15	17	17	18	18	.
Cyprus	0	0	0	0	0	0
Czech Republic	1	2	2	2	2	2
Denmark	1	1	1	0	0	.
Finland	8	8	9	9	9	9
France	317	321	295	245	240	256
Germany	460	466	432	397	408	399
Greece	2	3	3	3	2	2
Hungary	78	81	73	64	56	54
Ireland	13	14	15	15	16	18
Italy	301	313	298	211	243	245
Malta	0	0	0	0	0	0
Netherlands	.	.	.	.	.	.
Poland	386	407	363	409	367	349
Portugal	44	47	49	46	45	45
Romania	15	15	15	20	20	20
Slovakia	1	1	1	3	3	3
Slovenia	6	6	6	5	6	6
Spain	213	226	225	232	229	230
Sweden	5	5	5	5	5	4
<b>EU 27</b>	<b>1,917</b>	<b>1,984</b>	<b>1,861</b>	<b>1,733</b>	<b>1,721</b>	<b>1,713</b>
United Kingdom	175	174	125	117	110	110
<b>EU 28</b>	<b>2,103</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>
Brazil	172	160	157	162	133	.
Canada	165	153	150	150	.	.
Mexico	17	17	18	18	19	.
Russia	.	.	.	.	.	.
South Africa	596	596	.	.	.	.
USA	2,639	2,605	2,521	2,369	2,480	2,323
<b>World</b>	<b>5,673</b>	<b>5,664</b>	<b>5,402</b>	<b>5,118</b>	<b>5,205</b>	<b>5,100</b>

**Note:** Partial provisional or estimated.

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



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

	2019	2020	2021	2022	2023	2024
Austria	4.4	4.5	4.6	4.7	4.4	4.4
France	4.4	4.5	4.1	3.6	3.6	3.5
Germany	5.3	5.4	4.8	4.3	4.4	4.4
EU 28	4.1	.	.	.	.	.
EU 27	4.4	4.3	4.1	3.9	4.0	4.0
USA	7.3	7.1	6.9	6.6	6.7	6.3

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

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

	2019	2020	2021	2022	2023	2024
Austria	0.5	0.6	0.9	1.2	1.1	1.2
Belgium / Luxembourg	0.1	0.1	0.1	0.1	0.1	0.1
Denmark	1.5	1.3	0.0	0.1	0.1	.
Finland	0.0	0.0	0.0	0.0	0.0	0.0
France	219.0	192.0	177.0	117.8	136.5	187.8
Germany	36.5	28.9	24.1	24.3	23.5	21.7
Greece	0.1	0.1	0.0	0.0	0.0	.
Ireland	4.5	5.0	5.5	5.5	6.0	.
Italy	1.9	1.7	2.9	2.3	2.5	.
Netherlands	.	.	.	.	.	.
Portugal	10.5	9.6	9.7	9.6	11.9	10.7
Spain	4.6	4.5	4.3	3.3	3.5	.
Sweden	0.0	0.0	0.0	0.0	0.0	0.0
Bulgaria	19.8	19.8	19.9	22.4	24.9	.
Cyprus	0.0	0.0	0.0	0.0	0.0	0.0
Czech Republic	11.0	12.0	10.3	11.0	10.5	.
Estonia	.	.	.	.	.	.
Hungary	90.9	63.4	89.6	54.5	64.2	76.3
Latvia	.	.	.	.	.	.
Lithuania	0.0	0.0	0.0	0.0	0.0	0.0
Malta	.	.	.	.	.	.
Poland	61.9	63.5	57.5	65.5	67.7	76.2
Romania	.	.	.	.	.	.
Slovakia	0.6	0.6	0.6	0.6	0.6	.
Slovenia	.	.	.	.	.	.
<b>EU 27</b>	<b>550.0</b>	<b>500.0</b>	<b>495.0</b>	<b>395.0</b>	<b>430.0</b>	<b>450.0</b>
United Kingdom	28.3	22.7	21.3	19.7	18.1	.
<b>EU 28</b>	<b>577.9</b>	.	.	.	.	.
<b>World</b>	<b>6,017.7</b>	<b>6,165.9</b>	<b>6,213.8</b>	<b>6,635.9</b>	<b>7,055.6</b>	.

**Note:** Partial provisional or estimated (base = gross domestic production), official data on Duck production of only a few countries. Partly contradictory towards official information on poultry meat production.

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

#### For further data and information:

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#### 14. a) EU poultry meat balance sheet, 2005-2035 ('000 tonnes carcass weight equivalent)

	2025	2026	2027	2028	2029	2030	2031	2032
Gross Indigenous Production	14,038	14,074	14,066	14,090	14,115	14,135	14,157	14,177
Imports (meat)	867	869	871	874	877	880	884	889
Exports (meat)	1,924	1,965	1,980	1,990	1,989	2,008	2,010	2,019
Net trade (meat)	1,056	1,097	1,109	1,116	1,112	1,128	1,126	1,130
Domestic use	12,970	12,984	12,961	12,977	12,993	13,012	13,030	13,047
per capita consumption (kg r.w.e.)*	25.2	25.3	25.2	25.3	25.4	25.4	25.5	25.6
EU market price in EUR/t	2,517	2,528	2,555	2,581	2,607	2,625	2,648	2,669
World market price in EUR/t	1,588	1,601	1,631	1,670	1,702	1,729	1,754	1,782
World market price in USD/t	1,747	1,762	1,804	1,851	1,889	1,920	1,951	1,984

				Difference(a)		Annual growth (%) (b)	
	2033	2034	2035	2024-2014	2035-2024	2014-2024	2024-2035
Gross Indigenous Production	14,197	14,215	14,233	2,166.8	770.4	1.8%	0.5%
Imports (meat)	896	903	904	-96.8	81.7	-1.1%	0.9%
Exports (meat)	2,028	2,039	2,045	40.9	170.1	0.2%	0.8%
Net trade (meat)	1,132	1,136	1,141	137.7	88.5	1.4%	0.7%
Domestic use	13,066	13,084	13,096	2,029.1	685.6	1.8%	0.5%
per capita consumption (kg r.w.e.)*	25.6	25.7	25.8	3.6	1.6	1.6%	0.6%
EU market price in EUR/t	2,691	2,713	2,736	587.5	101.5	2.6%	0.3%
World market price in EUR/t	1,806	1,833	1,859	298.3	102.4	1.9%	0.5%
World market price in USD/t	2,012	2,044	2,073	-32.0	189.4	-0.2%	0.9%

\* r.w.e. = retail weight equivalent. Coefficients to transform carcass weight into retail weight are 0.7 for beef and veal, 0.78 for pigmeat and 0.88 for both poultry meat and sheep and goat meat.

Source: [https://agriculture.ec.europa.eu/data-and-analysis/markets/outlook/medium-term\\_en](https://agriculture.ec.europa.eu/data-and-analysis/markets/outlook/medium-term_en)

## 14. b) EU aggregate meat balance sheet, 2005–2035 ('000 tonnes carcass weight equivalent)

	2025	2026	2027	2028	2029	2030	2031	2032
Gross Indigenous Production	41,912	41,933	41,868	41,810	41,735	41,649	41,563	41,474
Imports of live animals	4	6	6	6	6	6	6	6
Exports of live animals	288	285	280	274	269	264	258	253
Net Production	41,628	41,654	41,594	41,541	41,472	41,391	41,310	41,226
Imports (meat)	1,471	1,470	1,472	1,475	1,478	1,482	1,486	1,492
Exports (meat)	5,436	5,501	5,539	5,563	5,575	5,600	5,610	5,622
Net trade (meat)	3,965	4,031	4,067	4,088	4,096	4,118	4,124	4,130
Domestic use	37,647	37,628	37,534	37,457	37,366	37,278	37,186	37,097
per capita consumption (kg r.w.e.)*	66.8	66.8	66.7	66.7	66.6	66.5	66.5	66.4
of which Beef and Veal meat	9.5	9.5	9.5	9.4	9.4	9.4	9.3	9.3
of which Sheep and Goat meat	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2
of which Pig meat	30.9	30.8	30.8	30.7	30.6	30.5	30.4	30.3
of which Poultry meat	25.2	25.3	25.2	25.3	25.4	25.4	25.5	25.6

	2033	2034	2035	Difference(a)		Annual growth(b)	
				2024-2014	2035-2024	2014-2024	2024-2035
Gross Indigenous Production	41,382	41,289	41,194	1,516.0	-918.8	0.4%	-0.2%
Imports of live animals	6	6	6	0.9	1.0	2.4%	1.9%
Exports of live animals	248	242	236	78.5	-67.4	3.0%	-2.3%
Net Production	41,140	41,052	40,964	1,438.5	-850.4	0.4%	-0.2%
Imports (meat)	1,500	1,509	1,511	-159.1	94.7	-1.1%	0.6%
Exports (meat)	5,635	5,650	5,659	420.4	-104.6	0.8%	-0.2%
Net trade (meat)	4,136	4,142	4,148	579.5	-199.3	1.4%	-0.4%
Domestic use	37,005	36,916	36,820	858.5	-646.6	0.2%	-0.2%
per capita consumption (kg r.w.e.)*	66.4	66.3	66.3	0.8	-0.3	0.1%	0.0%
of which Beef and Veal meat	9.3	9.3	9.2	-0.5	-0.6	-0.5%	-0.6%
of which Sheep and Goat meat	1.2	1.2	1.2	-0.1	0.0	-1.0%	-0.3%
of which Pig meat	30.2	30.1	30.0	-2.1	-1.3	-0.6%	-0.4%
of which Poultry meat	25.6	25.7	25.8	3.6	1.6	1.6%	0.6%

\* r.w.e. = retail weight equivalent. Coefficients to transform carcass weight into retail weight are 0.7 for beef and veal, 0.78 for pigmeat and 0.88 for both poultry meat and sheep and goat meat.

Source: [https://agriculture.ec.europa.eu/data-and-analysis/markets/outlook/medium-term\\_en](https://agriculture.ec.europa.eu/data-and-analysis/markets/outlook/medium-term_en)



## 15. EU27 poultry meat imports by product type, 2024, 2023, 2020, 2015

Product definition	Quantity (tonnes)				Value	
	2024	2023	2020	2015	2024	2023
Total Product Groups	902,489	895,307	804,772	961,508	2.43	2.36
Poultry salted meat in brine	247,228	248,319	227,658	315,547	1.82	1.73
Frozen chicken meat	214,317	221,647	176,358	220,626	2.05	1.88
Fresh chicken meat	193,214	208,848	159,784	121,590	1.30	1.20
Poultry preparations	160,383	141,049	114,052	203,286	5.11	5.67
Poultry fats	41,290	33,887	13,953	7,649	0.82	0.84
Chicken offals	21,947	19,805	75,169	46,655	0.47	0.62
Frozen turkey meat	14,816	15,139	21,531	22,496	2.73	3.00
Fresh turkey meat	5,547	2,979	7,414	16,580	1.43	1.82
Live poultry	1,506	1,362	2,335	1,570	0.77	0.91
Chicks	1,252	1,703	1,530	1,018	111.47	68.05
Frozen duck & goose meat	437	101	2,240	1,951	5.34	3.74
Turkey offals	407	384	1,643	1,108	0.92	1.04
Duck & goose offals	74	59	313	767	1.33	1.99
Fresh duck & goose meat	65	11	666	564	3.15	8.97
Other poultry fresh or frozen meat	4	7	89	88	6.15	5.41
Fatty duck & goose liver	2	5	35	10	43.77	40.27

Source: <https://agridata.ec.europa.eu/extensions/DashboardPoultry/PoultryTrade.html#>

## 16. EU27 poultry meat exports by product type 2024, 2023, 2020, 2015

Product definition	Quantity (tonnes)				Value	
	2024	2023	2020	2015	2024	2023
Total Product Groups	2,147,120	1,962,573	2,520,753	2,145,933	2.31	2.42
Frozen chicken meat	1,157,460	1,009,109	1,504,550	1,264,155	1.11	1.21
Fresh chicken meat	500,479	482,301	446,936	348,600	3.08	2.88
Poultry preparations	180,420	183,598	171,649	145,627	6.66	6.64
Chicken offals	102,323	99,098	136,155	84,090	0.92	0.91
Frozen turkey meat	100,702	94,752	134,003	130,798	1.54	1.91
Fresh turkey meat	42,548	33,182	30,452	39,993	3.40	3.86
Frozen duck & goose meat	22,165	21,593	23,391	32,614	2.90	4.12
Poultry fats	14,324	13,215	17,511	21,911	1.86	1.94
Turkey offals	7,699	6,159	6,776	19,785	1.11	1.23
Chicks	6,004	5,849	6,547	9,237	56.75	48.44
Poultry salted meat in brine	4,511	4,745	30,665	29,789	1.69	1.87
Duck & goose offals	2,512	2,344	3,925	4,481	2.62	3.23
Other poultry fresh or frozen meat	1,918	1,760	1,783	2,270	4.49	4.73
Fresh duck & goose meat	1,435	2,533	3,019	6,421	8.33	7.50
Fatty duck & goose liver	1,385	1,365	1,655	2,509	38.56	43.45
Live poultry	1,178	918	1,559	3,526	3.38	3.94
Other poultry offals	39	51	150	122	5.02	8.87
Poultry salted livers in brine	19	1	28	3	11.64	30.19

Source: <https://agridata.ec.europa.eu/extensions/DashboardPoultry/PoultryTrade.html#>





[www.avec-poultry.eu](http://www.avec-poultry.eu)



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