AVEC

THE VOICE OF EUROPE'S POULTRY MEAT SECTOR

ANNUAL REPORT 2026

1966–2026

60 years of progress.
One voice.

AVEC is the voice of the European poultry meat sector

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**

Contents

Introduction 4

Who we are 8

- Our association 10
- Our members 12
- AVEC working groups 14
- EU and international key partners 15

What we do 16

- Animal health and animal welfare 18
- Food safety and food quality 20
- Sustainable production 22
- Trade 24
- Turkey 26
- Communication 28
- Young People in Poultry (YPIP) 30
- European projects 32

Statistics 34

Introduction

Introduction

For sixty years, AVEC has championed the role of the European poultry sector as an essential contributor to Europe's food system. This year, that vision received its strongest political recognition yet.

Europe is entering a new chapter in the way it views livestock production. The publication of the European Commission's first ever EU Livestock Strategy marks a significant shift in political thinking, acknowledging livestock not as a challenge to be managed, but as a strategic asset that underpins food security, resilience, rural communities and Europe's strategic autonomy.

For the poultry sector, this is more than a policy milestone. It reflects principles that AVEC has consistently defended over many years: that competitiveness and sustainability must go hand in hand; that disease prevention is an investment rather than a cost; that European producers deserve fair competition based on reciprocal standards; and that consumers should have clear information about the origin of the food they buy.

The Strategy gives these principles a stronger political foundation. It recognises the need to improve competitiveness and profitability through investment and a more predictable regulatory framework, while reinforcing the importance of prevention and fair competition. The accompanying Protein Action Plan further highlights Europe's continued dependence on imported protein feed and the need to strengthen the resilience of feed supply chains. Together, these initiatives provide a more coherent framework for the future of European livestock.

The direction is encouraging. The real measure of success, however, will be implementation and translating these ambitions into policies that producers can realistically deliver.

Over the past year, AVEC continued to demonstrate the value of a strong, united European voice for the poultry sector. Working closely with its members and network of stakeholders, the association helped shape the debate on the future of European livestock policy and defended the sector's interests across key legislative files covering trade, animal health and welfare, food safety and quality, sustainability and competitiveness.

> **This stronger recognition of food security, competitiveness and prevention in the European debate is also a testament to the sustained advocacy of AVEC and its members, and to our consistent efforts to ensure that the realities of poultry production are reflected in European policymaking.**

As a result, AVEC further strengthened its position as the recognised voice of the European poultry sector in Brussels, becoming an increasingly trusted partner for the European institutions and recognised source of expertise for the media. At the same time, closer cooperation with ELPHA and EPB reinforced the poultry value chain's ability to advocate with one coherent voice, while the launch of Young People in Poultry created a platform for the next generation of professionals to contribute fresh ideas and perspectives. Together, these initiatives reflect a shared commitment to building a sector that is competitive, resilient and equipped for the future.

Looking back over six decades, AVEC's greatest achievement is not simply the positions it has defended, but the partnerships it has built. For sixty years, members from across Europe have come together to exchange expertise, overcome differences and speak with one voice on the issues that matter most to the sector. That spirit of cooperation has both enabled AVEC to navigate changing political priorities, market pressures and animal health challenges, and influence European policymaking. It will be just as important as Europe moves from ambition to implementation.

Europe has recognised that livestock is part of the solution, but it's only the beginning. Our task now is to convert that recognition into practical, science-based, economically viable policies that fit the realities of food production and create the conditions for producers to invest, innovate and compete. By continuing to work together, AVEC will ensure that the European poultry sector remains a trusted partner in delivering Europe's food security and resilience, as well as the global benchmark for production and sustainability for the next sixty years.

Birthe Steenberg
Secretary General

Gert-Jan Oplaat
President

Who we are

Our association

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 policymakers 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)

Philippe Gélin
FIA (France)

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 2025–2026

Country	Board member	Deputy board member
AUSTRIA	Harald Schliessnig	Stefan Weber
BELGIUM	Ron Priem	Ann Truyen
DENMARK	Stig Munck Larsen	Morten Cederberg
FINLAND	Riitta Rahkila	Risto Lahti
FRANCE	Philippe Gélin	Yann Brice
GERMANY	Franz-Josef Rothkötter	Wolfgang Schleicher
HUNGARY	Dr. Attila Csorbai	György Endrödi
ITALY	Mario Veronesi	Lara Sanfrancesco
LATVIA	Anna Erliha	Saulius Petkevičius
NETHERLANDS	Gert-Jan Oplaat	Mark den Hartog
POLAND	Dariusz Goszczyński	Zbigniew Idziaszek
PORTUGAL	Avelino Gaspar	Mariana 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

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

GERMANY
Bundesverband der Geflügelschlachtereien e.V.
Phone: +49 30 28 88 31 10
E-mail: bvg@zdg-online.de
www.zdg-online.de

HUNGARY
BTT – Baromfi Termék Tanács
Phone: +361 269 2998
E-mail: titkarsag@magyarbaromfi.hu
www.mbtt.hu

ITALY
UNAITALIA – Unione Nazionale Filiere Agroalimentari Delle Carni e Delle Uova
Phone: +39-0645541050
E-mail: unaitalia@unaitalia.com
www.unaitalia.com

LATVIA
Latvian Egg and Poultry Producers Association
Phone: +371 26147764
E-mail: info@poultry.lv
www.poultry.lv

NETHERLANDS
NEPLUVI
Phone: +31 30 63 55 252
E-mail: info@nepluvi.nl
www.nepluvi.nl

POLAND
KRD – Krajowa Rada Drobiarstwa – Izba Gospodarcza
Phone: +48 (0-22) 82 82 389
E-mail: krd-ig@krd-ig.com.pl
www.krd-ig.com.pl

PORTUGAL
ANCAVE – Associação Nacional dos Centros de Abate e Indústrias Transformadoras de Carne de Aves
Phone: +351 217 9 66 439
E-mail: ancave@mail.telepac.pt

ROMANIA
UCPR – Uniunea Crescatorilor de Pasari din Romania
Phone: +40 (0)21 666 37 65
E-mail: ilievan@yahoo.com
www.avicultura.ro

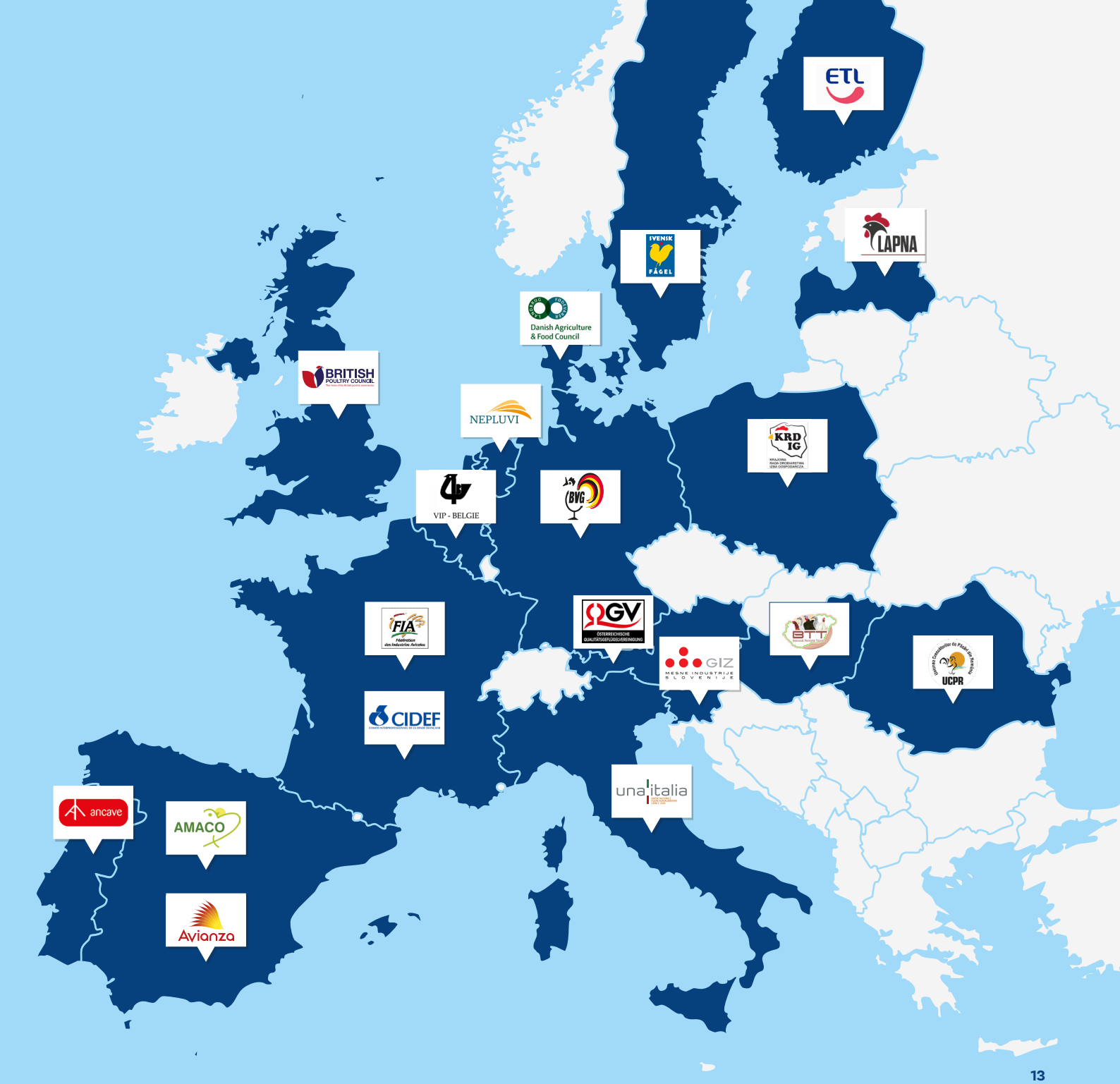
SLOVENIA
GIZ Mesne Industrije Slovenije
Phone: + 386 41 790 853
E-mail: giz.mi@siol.net
www.giz-mi.si

SPAIN
AMACO
Phone: +34 91 51 58 545
E-mail: amaco@amaco.es
www.amaco.es

SPAIN
AVIANZA
Phone: +34 91 562 42 93
E-mail: avianza@avianza.org
www.avianza.org/en

SWEDEN
Svensk Fågel
Phone: +46 8 787 55 20
E-mail: maria.donis@svenskfagel.se
www.svenskfagel.se

UNITED KINGDOM
BPC – British Poultry Council
Phone: +44 203 544 1675
E-mail: info@britishpoultry.org.uk
www.britishpoultry.org.uk


ETL
LAPNA
IVENIK
FÅGEL
Danish Agriculture & Food Council
BRITISH POULTRY COUNCIL
NEPLUVI
KRD IG
VIP - BELGIE
BVG
FIA
ÖGV
ÖSTERREICHISCHE QUALITÄTSGEFLÜGELVEREINIGUNG
GIZ
MESNE INDUSTRIJE SLOVENIJE
UCPR
CIDEF
una italia
ancave
AMACO
Avianza

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 policymakers 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.

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 2025–2026. 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

The Animal Health and Animal Welfare Working Group continued to cooperate closely with ELPHA, the European Live Poultry and Hatching Egg Association. This joint approach strengthened the exchange of technical expertise across the poultry chain and enabled the sector to present more consistent messages to EU institutions.

> ***The Commission proposal on the welfare of animals during transport remained the main animal welfare file.***

Discussions continued under the Danish and Cypriot Council Presidencies, while the European Parliament paused a large number of amendments. AVEC, ELPHA and EPB provided poultry-specific evidence and maintained a constructive dialogue with policymakers. Particular attention was given to temperature requirements, journey times, container design, feeding and watering provisions, and the specific needs of day-old chicks. The sector consistently called for rules that deliver genuine welfare improvements, while remaining measurable, enforceable and operationally workable.

AVEC and ELPHA also contributed to the Commission subgroup on animal welfare policy indicators. The sector advocated for a limited set of practical, harmonised and scientifically validated indicators that can support monitoring and continuous improvement. Indicators should remain proportionate and not automatically become enforcement, ranking or labelling tools without further assessment.

Harald Schliessnig
Animal Health and Animal Welfare Working Group Chair

Highly pathogenic avian influenza (HPAI) continued to place sustained pressure on European poultry production and trade. Vaccination moved from policy discussion towards practical implementation, with field trials in several European countries. AVEC followed national vaccination strategies closely and promoted proportionate surveillance requirements, along with science-based acceptance of products from vaccinated birds. The adoption of updated EU rules for HPAI vaccination surveillance was an important development, although implementation costs and international trade barriers remain major concerns.

Newcastle disease also re-emerged as a serious threat in parts of Europe. Recent outbreaks highlighted that vaccine availability alone is not sufficient. Vaccination programmes must be properly designed, implemented and monitored, and complemented with strong biosecurity, rapid detection and effective coordination between authorities and the sector.

AVEC also reinforced its call for a stronger EU prevention approach to animal diseases, combining biosecurity, surveillance, vaccination, research and veterinary capacity, rather than relying primarily on emergency control and culling.

Scan the QR code to read the full position presentation

Future priorities

- Continue to engage with the European Parliament and Council to secure practical, poultry-specific rules on animal transport.
- Promote proportionate, outcome-based welfare indicators that support continuous improvement.
- Monitor HPAI developments and vaccination plans, while advocating for proportionate surveillance and fair, science-based trade conditions.
- Strengthen preparedness for Newcastle disease through effective vaccination, biosecurity and early detection.
- Advocate for greater EU investment in animal disease prevention, surveillance, veterinary capacity and vaccine research.

Food safety and food quality

The Food Safety and Food Quality Working Group continued to provide AVEC members with practical information on EU developments affecting poultry meat marketing, official controls, composition criteria and food safety interpretation. The period was marked by a clear need for simplification and legal certainty, as new rules came into force. Several long-standing files remained subject to different interpretations across Member States.

The working group elected Bart Spanoghe, veterinarian, as its new chair. Bart brings strong technical and practical expertise to AVEC's work in this area.

A major focus was the implementation of the revised EU marketing standards for poultry meat. AVEC followed the delegated and implementing acts closely, and supported members to understand the practical consequences for labelling, product descriptions and controls. Particular attention was given to the water/protein ratio. AVEC stressed that this control must remain targeted at fraud and intentional addition of water, and should not become a disproportionate burden for compliant slaughterhouses. The sector continued to call for a harmonised, risk-based and evidence-based approach, taking into account modern processing realities and official records.

AVEC also contributed to the Commission's Food and Feed Safety Simplification Omnibus proposal. We supported the objective of reducing unnecessary administrative burden, while maintaining high food and feed safety standards.

Bart Spanoghe
Food Safety and Food Quality Working Group Chair

The poultry sector underlined that simplification should be practical, risk-based and focused on implementation. This will allow competent authorities to target resources where risks are highest, while avoiding duplication and unnecessary paperwork for compliant operators.

Mechanically separated meat (MSM) remained another key file. Discussions confirmed that the absence of a common EU interpretation has created uncertainty for both operators and authorities. AVEC worked to frame a balanced position based on the characteristics of the final product, rather than on the technology used.

The working group also monitored developments on maximum residue levels for copper, Codex discussions on frozen poultry meat, and emerging issues such as the use of D-xylose in imported poultry products.

The food safety and food quality team encouraged members to contribute to national workshops and country-specific discussions across all these areas. Active participation in scientific projects and conferences provided valuable insights, strengthened cooperation within AVEC and helped further develop its positions.

> ***Overall, our work focused on defending science-based rules, avoiding fragmented enforcement, and ensuring that high food safety standards remain compatible with fair competition, simplification and efficient use of poultry resources.***

Future priorities

- Secure harmonised and risk-based implementation of the revised poultry meat marketing standards, including the water/protein ratio.
- Follow the Food and Feed Safety Simplification Omnibus and promote practical simplification without lowering food safety standards.
- Continue work towards a clear EU interpretation of MSM and related products, based on objective criteria and final product characteristics.
- Keep origin labelling high on the EU agenda, with a focus on clear, reliable and enforceable information for consumers, especially in debates on imported poultry meat and products served through food service.
- Continue monitoring EU and national developments on food safety risks and contaminants, with particular reference to *Salmonella* and *Campylobacter* control in poultry meat.
- Support the EU's sustainability and food waste reduction objectives by promoting a more proportionate, risk-based approach to the classification and use of animal by-products, helping to prevent avoidable losses and improve resource efficiency across the poultry chain.

Sustainable production

In 2025–2026, the AVEC Sustainability Working Group enabled members to exchange expertise, align positions and shape AVEC's response to the EU's rapidly evolving sustainability agenda. Inflation, geopolitical instability, avian influenza and concerns about food security, self-sufficiency and competitiveness have changed the operating context. The group therefore focused on methodological credibility, regulatory simplification and policies that are ambitious, science-based and workable for European poultry producers.

A major area of work was the harmonisation of Life Cycle Assessment methodologies for poultry meat. The University of Bologna and Blonk Consulting showed how differences in system boundaries, allocation methods, manure assumptions, data sources and functional units affect reported environmental performance. Credible and comparable methods are essential to measure progress fairly. Without greater alignment, fragmentation between national initiatives, retailer schemes and private standards, could hinder producers from demonstrating progress, and stakeholders from comparing results. Although a common EU methodology has not been achieved, greater consistency should guide work at national, local and company level.

The Working Group also closely followed the revised Industrial Emissions Directive and Uniform Conditions for Operating Rules for poultry and pig farms. AVEC worked with members, Copa-Cogeca and EU institutions to defend proportionality, technical feasibility and flexibility for different production systems. Improvements were secured for existing farms and naturally ventilated broiler houses.

Saulius Petkevičius
Sustainable Production Working Group Chair

Concerns remain over emission values, increased monitoring obligations and the practical impact of national transposition. Sustainability rules must reduce environmental impact, but they must also be technically feasible, economically realistic and adapted to the diversity of EU production systems.

On the deforestation regulation, AVEC worked with FEFAC and other agri-food organisations to highlight uncertainties linked to implementation, particularly for soy and soybean meal used in feed. The association supports fighting deforestation, but implementation must be workable. Rules that create uncertainty, increase feed costs or weaken access to essential raw materials risk undermining the competitiveness and feed security of the European poultry sector, given the limited short term substitution potential of alternative proteins.

The Working Group also contributed to discussions on organic poultry farming. AVEC defended the possibility to rear organic poultry from non-organic chicks and the permanent maintenance of the 95% organic feed rule, allowing up to 5% non-organic protein feed where necessary. These are essential conditions for keeping organic poultry production viable, scalable and accessible for European producers and consumers.

Alongside regulatory and methodological work, members shared examples of circular-economy solutions, biogas production, rendering, renewable energy, heat recovery, odour control and manure valorisation.

> ***The poultry sector is not waiting for sustainability to happen. It is already investing, adapting and delivering practical environmental progress.***

Continued progress, however, depends on realistic investment frameworks and proportionate regulation that enable producers to innovate faster and contribute meaningfully to Europe's sustainability objectives.

The work of the group confirmed that the EU poultry sector is ready to contribute constructively to the EU sustainability agenda. Sustainability must support environmental progress without compromising food security, competitiveness or the resilience of European production.

As Chair of the Sustainability Working Group, I thank members for their contribution, expertise and engagement. Our task remains clear: to help shape a sustainability agenda that delivers real progress for the environment, for producers, for consumers and for the long-term resilience of the European poultry sector.

Future priorities

- Promote harmonised, science-based and credible LCA methodologies for poultry meat.
- Follow the implementation of the revised IED, UCOL, national transposition processes and the Environmental Omnibus, with a continued focus on proportionality and technical feasibility.
- Monitor the implementation of the EUDR and its impact on soy availability, feed costs and the competitiveness of the poultry sector.
- Defend AVEC's priorities in organic farming discussions, especially regarding chicks and feed rules.
- Collect and communicate best practices on circular economy, manure valorisation, renewable energy, odour control and resource efficiency.
- Explore opportunities under future EU funding instruments to support sustainability investments across the poultry value chain.

Trade

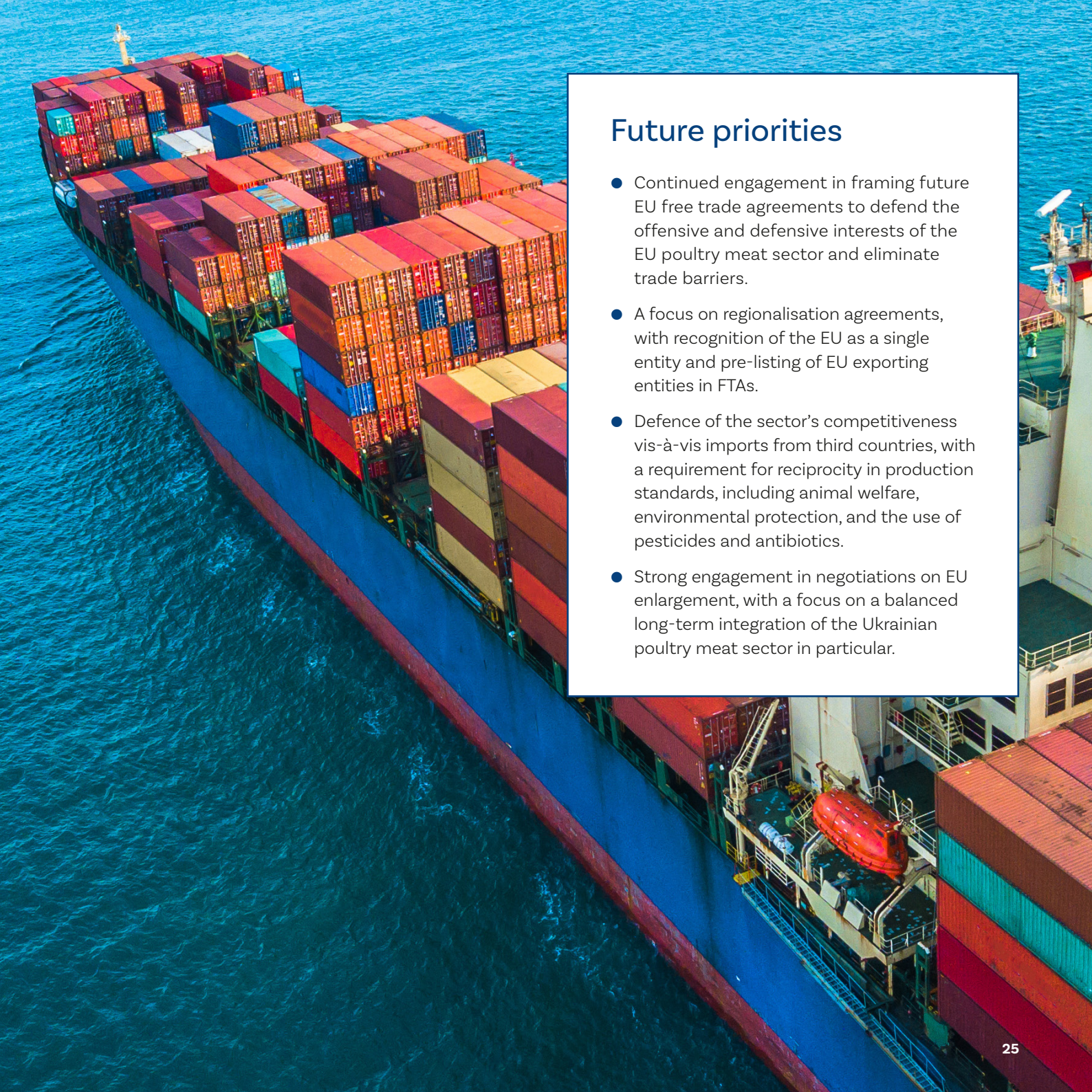
> ***New winds blowing in the EU Commission – a serious interest in defending EU agriculture and food production, with a strong focus on resilient food systems and food security.***

Stig Munck Larsen
Trade Working Group Chair

Poultry meat production in the EU has been put under extreme strain over a sustained period as a result of severe outbreaks of animal diseases in many countries. This has led to an imbalance in the market, resulting in higher prices and increased imports from third countries. The Mercosur free trade agreement, with its additional concessions of 180,000 tonnes of poultry meat over 6 years could become a significant additional source of pressure on the EU poultry market. Other challenges have included the deal with Ukraine, a surge in imports from China, plus ongoing free trade negotiations with Thailand, with possible further concessions on poultry meat. Collectively, these regions account for a significant proportion of high-value breast meat in the EU. In the long-term, this could challenge the recovery and further expansion of the EU poultry sector – despite the fact that poultry meat consumption in the EU is expected to increase for many years to come.

As poultry meat production in the EU recovers from the dip caused by disease outbreaks, further increases in imports will not be sustainable. They risk negatively impacting both supply and prices, disrupting the EU poultry market and damaging our poultry meat sector. In recognition of this, AVEC has been working actively with a coalition of EU agri-food sectors that share our goals to ensure the deals with Mercosur and Ukraine lead to balanced outcomes. These joint actions have pushed for fair compromises, along with quotas and guarantees to address surges in imports resulting from trade liberalisation. AVEC is also open to transparent dialogue with the Ukrainian agri-food sector in order to exchange views on possible EU enlargement. This provides an opportunity for both sides to share knowledge and eliminate misconceptions. The goal of this preliminary work by AVEC is to ensure a smooth transition for enlargement, avoiding significant disruption of the existing EU poultry sector. The aim is to create a win-win situation, leading to more production and consumption, and a competitive poultry sector that is stronger overall.

AVEC acknowledges that trade is a necessary part of business, and that exports to third countries are needed to optimise the carcass balance and stay competitive. However, we believe that a level playing field must be a core principle of the poultry sector. We demand that imports meet the same production standards across the entire value chain. This should be an integrated requirement in all free trade agreements, in compliance with WTO rules.



Future priorities

- Continued engagement in framing future EU free trade agreements to defend the offensive and defensive interests of the EU poultry meat sector and eliminate trade barriers.
- A focus on regionalisation agreements, with recognition of the EU as a single entity and pre-listing of EU exporting entities in FTAs.
- Defence of the sector's competitiveness vis-à-vis imports from third countries, with a requirement for reciprocity in production standards, including animal welfare, environmental protection, and the use of pesticides and antibiotics.
- Strong engagement in negotiations on EU enlargement, with a focus on a balanced long-term integration of the Ukrainian poultry meat sector in particular.

Turkey

The European turkey sector began the current reporting period facing a number of challenges, including high production costs, animal health pressures and changing consumer habits. Despite that, turkey meat continues to offer clear strengths: it is a lean, high-protein and versatile product, with a strong place in balanced diets and many opportunities for further development.

During the year, the Turkey Working Group focused on two complementary priorities: defending a realistic policy framework for turkey production and supporting stronger market positioning for turkey meat. Following the publication of EFSA's scientific opinion on the welfare of turkeys on farms, AVEC underlined the sector's commitment to continuous improvement. At the same time, we stressed that future policy discussions must be based on robust scientific evidence, practical farm experience and a full assessment of animal health, biosecurity, environmental and economic impacts.

The opinion highlighted important welfare questions, but also confirmed the need for caution. Welfare outcomes cannot be assessed through housing parameters alone. Modern turkey production relies on the interaction between housing, management, health programmes, genetics and the expertise of trained staff. AVEC therefore advocated for a holistic and proportionate approach, recognising the progress that has already been achieved by breeding programmes, and the need for further turkey-specific research before translating recommendations into legislation.

Yannick Carré
Interim Chair, Turkey Working Group

> ***"The future of the European turkey sector will depend on its ability to move beyond price competition and build value through innovation, differentiation and consumer trust."***

In parallel, the Turkey Working Group held a strategic workshop in Brussels in October 2025 to assess the sector's market position and future competitiveness. The discussions illustrated that the main challenge is not simply production capacity, but insufficient consumer demand and limited market differentiation compared with chicken. Participants agreed that competing mainly on price is neither realistic nor sustainable.

The workshop supported a strategic shift towards value creation and led to three key recommendations:

- Repositioning turkey as a premium and healthy alternative to red meat.
- Increasing visibility in retail and foodservice.
- Accelerating innovation in ready-to-cook and ready-to-eat products.

It also recognised that better communication and targeting towards younger, more health-conscious consumers will be essential in highlighting turkey's nutritional qualities, sustainability track-record and culinary flexibility.

Scan the QR code to read the full report

Future priorities

- Engage with policymakers to ensure any future welfare rules for turkeys are science-based, proportionate, practical and economically sustainable.
- Strengthen the evidence-base by encouraging further turkey-specific research and better recognition of farm-level data and experience.
- Support market differentiation by promoting turkey as a healthy, versatile and valuable protein choice.
- Encourage innovation in products and formats that reflect modern consumer expectations, including convenience and foodservice opportunities.
- Improve communication and cooperation across the European turkey chain to reinforce competitiveness, consumer trust and long-term resilience.

Communication

Communication plays an increasingly important role in ensuring that the voice of the European poultry sector is heard both by the public and in policy debates. As discussions on competitiveness, food security, sustainability, animal welfare and the future of livestock production continue to evolve, clear and evidence-based communication has become an essential part of effective advocacy.

Throughout the year, AVEC supported key policy priorities through targeted communication activities and campaigns covering fair trade, EU production and consumption, animal health and welfare, origin labelling and the protection of meat denominations. The association also responded to major policy developments, including discussions surrounding the future EU Livestock Strategy, and the role of livestock in Europe's food system.

At the same time, AVEC continued to strengthen its position as a trusted source of expertise on EU poultry policy. The association has established strong relationships with Brussels-based media, and is increasingly approached by European, international, national and specialised trade media seeking the sector's perspective on developments affecting poultry production, trade and food policy.

The communication environment remains challenging. We continue to face coordinated campaigns across the EU targeting livestock production and debates on production systems and animal welfare, along with growing scrutiny of food production practices. These require the sector to communicate proactively and transparently.

Lara Sanfrancesco
Communication Working Group Chair

> ***"Building consumer trust and ensuring that public debate is informed by science, facts and practical experience will remain essential."***

Recognising that many communication challenges extend across the poultry value chain, AVEC expanded its Communication Working Group in 2026 to include communication professionals from ELPHA and EPB. This cooperation strengthens the sector's ability to share expertise, anticipate reputational challenges and promote a more coherent narrative on the contribution of the poultry sector to Europe's economy, food security and rural communities.

Future priorities

- Strengthen trust in the European poultry sector by promoting evidence-based discussions on animal welfare, animal health and sustainability.
- Demonstrate the sector's contribution to Europe by communicating its role in food security, affordability, employment, competitiveness and rural communities.
- Bring competitiveness to life by translating the findings of AVEC's competitiveness study into clear and accessible messages for policymakers, media and stakeholders.
- Increase visibility of the poultry value chain by showcasing the people, innovation, science and expertise behind breeding, hatching, farming, processing and trade.
- Anticipate emerging reputational challenges through stronger cooperation across the value chain, improved monitoring, and coordinated responses to misinformation and public campaigns.
- Further strengthen AVEC's position as a trusted voice on EU poultry policy by engaging proactively with policymakers, stakeholders and media.

Young People in Poultry (YPIP)

Attracting and developing the next generation of innovators and leaders is essential to maintaining a competitive and resilient European poultry sector. To support this objective, AVEC launched Young People in Poultry (YPIP) in 2026, bringing together young professionals from across Europe to exchange ideas, build connections and contribute to the future direction of the industry.

More than twenty participants from eleven countries gathered in Brussels for the network's first meeting in April 2026. Over two days, they explored the European policy landscape, exchanged experiences from their national markets and discussed the opportunities and challenges facing the sector in the years ahead. Meetings with representatives of Copa-Cogeca, CEJA and the European Parliament highlighted the importance of ensuring that younger voices are represented in discussions on the future of agriculture and livestock production.

The discussions resulted in a roadmap for 2026–2027, focused on strengthening European cooperation among young professionals, increasing their contribution to policy discussions, showcasing innovation across the poultry value chain, and supporting generational renewal. Participants identified competitiveness, the availability of labour, investment conditions and regulatory stability as among the issues that will shape the future of the industry.

Mariana dos Santos
Chair, Young People in Poultry (YPIP)

> ***"The future of the European poultry sector depends on attracting, connecting and empowering the next generation of leaders."***

To support these objectives, the group agreed a programme of activities, including the exchange of best practices and market insights, engagement with policymakers and stakeholders, and the organisation of an annual flagship event combining networking, field visits and policy discussions. Particular emphasis will be placed on highlighting innovation, promoting careers in the sector and bringing the perspectives of younger professionals into AVEC's advocacy work.

Following the launch of the network, Mariana dos Santos (Portugal) was elected chair and Jordi Montfort (Spain) vice-chair of YPIP. Under their leadership, the group will work to strengthen collaboration across borders and help ensure that the next generation is actively involved in shaping the future of the European poultry sector.

Future priorities

- Deliver the first annual YPIP event, bringing together young professionals, policymakers and industry representatives from across Europe.
- Strengthen the contribution of younger professionals to discussions on competitiveness, labour, investment and the future of livestock production.
- Showcase innovation, best practices and career opportunities across the poultry value chain.
- Promote skills development, leadership and generational renewal within the sector.
- Establish YPIP as a recognised European platform for the next generation of poultry leaders.

European projects

MOZART

AVEC's first partnership with a research and innovation programme began in October 2022 with the launch of MOZART (Morphing Computerised 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 in 2026, the outcomes and technological advancements will be presented and shared with AVEC stakeholders.

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

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.

The project will conclude in 2026.

Discover more on the BREADCRUMB website:
https://www.breadcrumb-project.eu/

BREADCRUMB

Statistics

G2

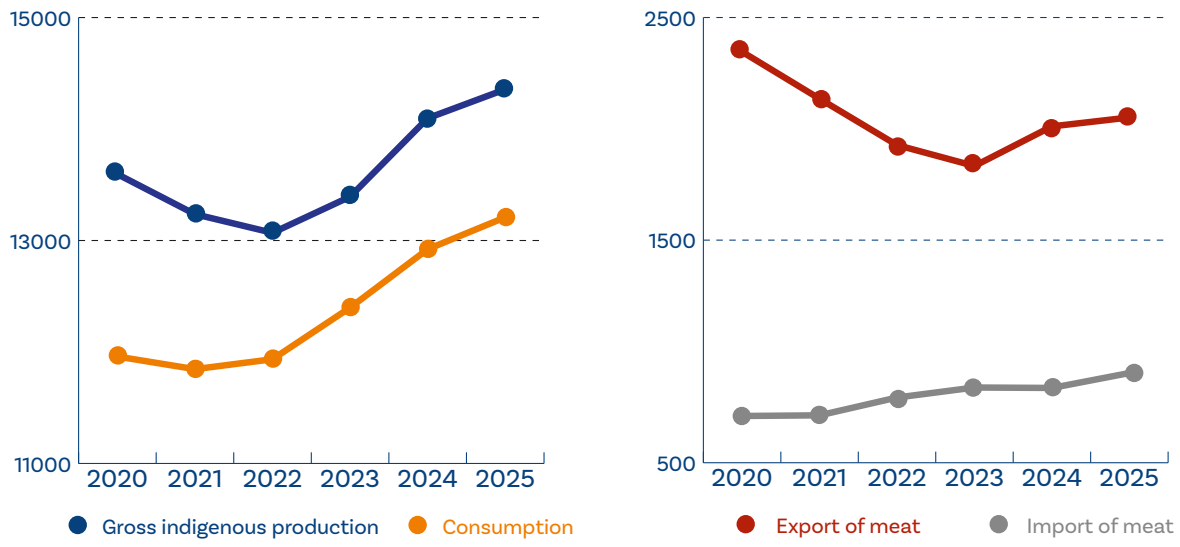
Statistics

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

	2020	2021	2022	2023	2024	2025p
EU 27						
Gross indigenous production	13,595	13,236	13,069	13,393	14,097	14,356
Export of meat	2,346	2,135	1,927	1,833	2,011	2,051
Import of meat	710	713	793	838	836	903
Consumption	11,959	11,846	11,935	12,398	12,922	13,208
Consumption per capita, kg	26.8	26.6	26.8	27.7	28.8	29.3
Self-sufficiency, %	114	112	110	108	109	109

Note: *Partial provisional or estimated.*
Source: *EU-Commission, so the gross indigenous production is different to table No. 2.*

EU 27 Balance sheet for poultry meat ('000 tonnes carcass weight)

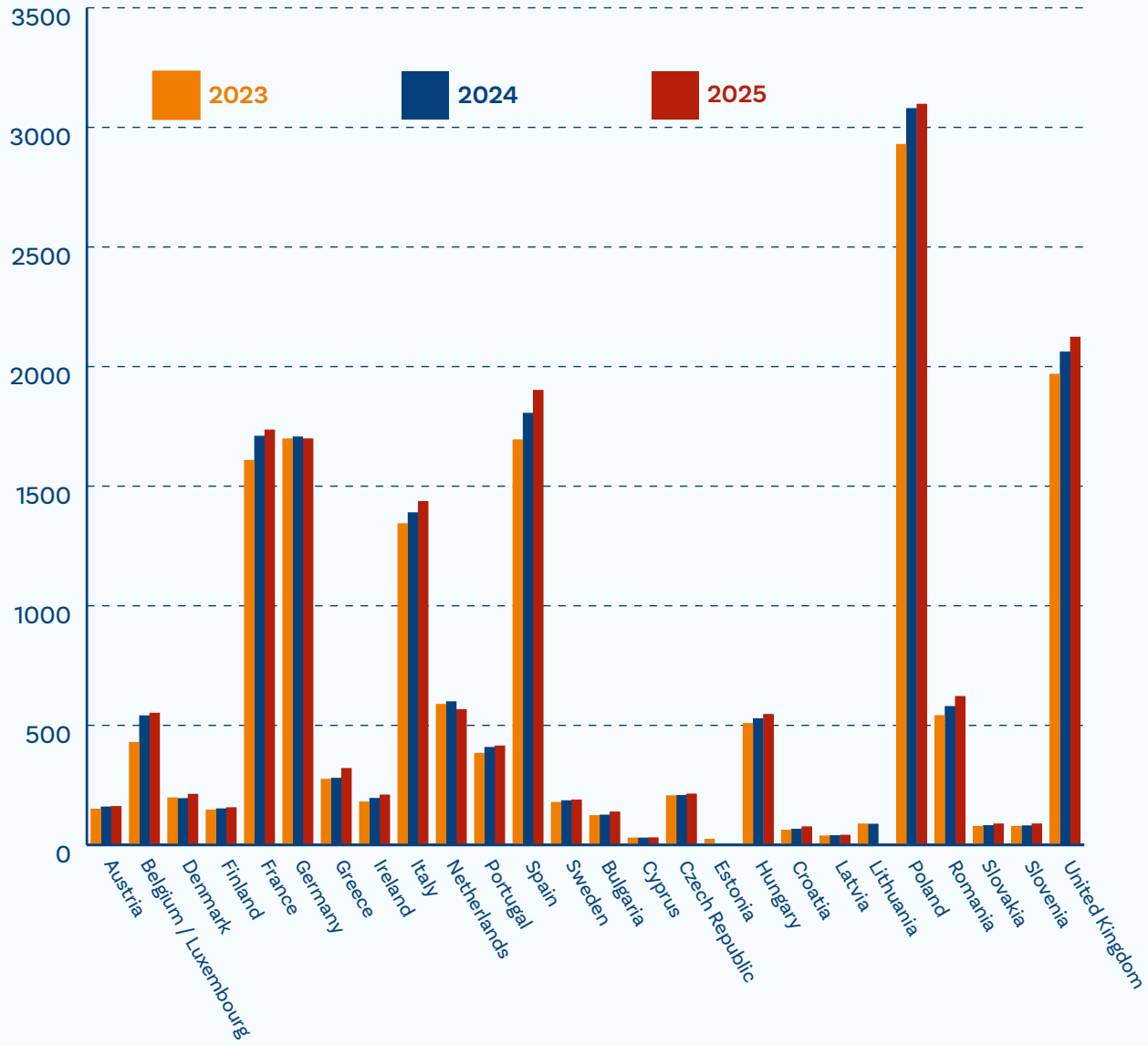


2. Gross domestic production of poultry meat in the EU and UK ('000 tonnes carcass weight)

	2020	2021	2022	2023	2024	2025p
Austria	144	150	152	149	158	160
Belgium / Luxembourg	449	455	449	428	539	550
Denmark	165	162	188	196	193	211
Finland	142	147	147	145	150	155
France	1,733	1,684	1,576	1,607	1,708	1,734
Germany	1,743	1,691	1,648	1,697	1,705	1,697
Greece	239	239	249	274	278	319
Ireland	166	163	170	179	194	208
Italy	1,390	1,374	1,218	1,342	1,388	1,435
Netherlands	.	.	535	587	598	565
Portugal	349	359	372	382	407	413
Spain	.	.	1,636	1,693	1,804	1,900
Sweden	172	182	178	177	184	187
Bulgaria	102	102	121	122	124	137
Cyprus	27	27	27	28	28	29
Czech Republic	200	200	205	205	206	212
Estonia	22	23	23	23	.	.
Hungary	.	.	472	507	527	545
Croatia	70	71	61	61	65	75
Latvia	35	35	37	37	38	40
Lithuania	101	87	87	87	86	.
Poland	2,981	2,762	2,908	2,928	3,078	3,096
Romania	487	490	516	540	578	620
Slovakia	.	.	77	77	80	87
Slovenia	.	.	75	77	79	87
EU 27	**13,541**	**13,236**	**13,130**	**13,554**	**14,224**	**14,574**
United Kingdom	1,959	1,989	1,983	1,967	2,060	2,122

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 and UK (2023–2025)



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

	2020	2021	2022	2023	2024	2025p
Argentina	2,316	2,295	2,319	2,287	2,316	2,387
Brazil	14,683	15,233	14,782	14,935	15,189	15,591
Chile	767	751	768	759	778	798
China	23,610	23,801	24,430	25,630	26,600	26,854
India	4,517	4,686	4,952	5,103	5,270	5,467
Japan	1,649	1,668	1,668	1,690	1,719	1,720
Mexico	3,594	3,684	3,797	3,885	3,979	4,093
Russia	5,011	5,078	5,307	5,338	5,402	5,433
Saudi Arabia	901	930	1,129	1,149	1,174	1,204
Switzerland	107	112	115	113	118	120
South Africa	1,901	1,922	1,962	1,874	1,967	2,060
Turkey	2,250	2,335	2,511	2,415	2,488	2,572
Ukraine	1,232	1,270	1,180	1,243	1,251	1,287
United Kingdom	1,959	1,989	1,983	1,967	2,060	2,122
USA	22,828	22,887	23,327	23,291	23,406	23,746
World Production	**137,278**	**139,087**	**141,936**	**144,577**	**148,183**	**151,435**

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

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

	2021	2022	2023	2024	2025	2025 from third countries -EU 27
Poultry Meat[1]						
Austria	104	115	115	156	195	38
Belgium / Luxembourg	305	305	270	261	264	21
Bulgaria	93	94	103	103	90	1
Croatia	.	24	29	32	26	2
Cyprus	12	14	17	18	18	1
Czech Republic	104	124	136	153	155	3
Denmark	63	61	55	51	49	1
Estonia	22	23	25	25	25	0
Finland	7	9	11	15	13	0
France	524	557	576	581	614	46
Germany	695	692	701	742	858	9
Greece	82	85	89	91	100	3
Hungary	71	85	101	60	50	0
Ireland	65	86	86	78	82	21
Italy	74	123	87	88	99	1
Latvia	44	40	40	42	42	0
Lithuania	46	42	47	47	43	2
Malta	5	5	6	8	9	0
Netherlands	696	777	813	767	792	192
Poland	78	69	59	50	72	0
Portugal	67	73	86	92	98	3
Romania	124	117	116	122	99	2
Slovakia	59	86	122	129	98	7
Slovenia	17	20	23	24	25	1
Spain	138	160	184	207	224	32
Sweden	57	70	72	69	66	0
EU 27 from third countries	**375**	**376**	**405**	**384**	**387**	**.**
Salted meat [2]						
Germany	35	40	37	30	28	5
Netherlands	142	148	147	157	147	142
EU 27 from third countries	**160**	**169**	**171**	**171**	**152**	**.**
Preparations of poultry [3]						
EU 27 from third countries	**146**	**191**	**187**	**207**	**238**	**.**

Note: *1) Without preparations, livers, salted meat and live poultry. – Data in the EUROSTAT trade statistics and trade balance are partial different. 2) tariff 0210 99 39, almost exclusively poultry. 3) tariff items 1602 31 .. 1602 32 .. and 1602 39 ...*
Source: *MEG to Eurostat and national statistics.*

5. Export of EU countries of poultry meat ('000 tonnes carcass weight)

	2021	2022	2023	2024	2025	2025 from third countries -EU 27
Poultry Meat[1]						
Austria	72	69	69	93	121	1
Belgium / Luxembourg	542	479	476	529	523	125
Bulgaria	35	38	34	32	30	3
Croatia	11	11	11	10	10	5
Cyprus	1	1	1	1	1	1
Czech Republic	19	28	24	24	28	1
Denmark	69	84	82	81	90	21
Estonia	9	8	9	10	10	0
Finland	13	11	7	9	11	5
France	360	354	304	324	367	117
Germany	427	495	439	416	395	47
Greece	42	44	45	47	52	17
Hungary	244	219	241	221	228	53
Ireland	63	72	64	63	64	40
Italy	174	129	164	169	173	53
Latvia	16	16	16	20	22	3
Lithuania	41	38	41	44	41	13
Malta	0	0	0	0	0	.
Netherlands	1,320	1,364	1,289	1,251	1,314	392
Poland	1,482	1,586	1,646	1,810	1,775	600
Portugal	37	34	37	37	40	11
Romania	79	82	91	105	153	44
Slovakia	22	29	49	39	40	3
Slovenia	25	24	26	26	32	6
Spain	246	210	214	223	237	79
Sweden	81	92	80	70	84	10
EU 27 to third countries	**1,809**	**1,623**	**1,559**	**1,708**	**1,653**	**.**
Preparations of poultry [2]						
EU 27 to third countries	**245**	**262**	**271**	**265**	**266**	**.**

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)

	2020	2021	2022	2023	2024	2025p
Total imports of poultry meat						
Switzerland	43	45	45	45	56	61
Imports of broiler meat						
Angola	213	263	353	210	258	260
China	999	788	633	756	477	300
Iraq	468	469	531	529	552	480
Japan	1,005	1,077	1,101	1,063	1,143	1,145
Russian Federation	200	220	.	.	.	.
Saudi Arabia	618	615	594	564	607	645
United Arab. Emirates	358	384	356	375	385	400
Exports of broiler meat						
Argentina	196	183	194	144	175	145
Belarus	190	184	.	.	.	.
Brazil	3,875	4,226	4,447	4,767	4,894	4,975
Chile	136	133	.	.	.	
China	388	457	532	554	770	1,050
Thailand	917	907	1,021	1,098	1,170	1,250
Turkey	465	559	646	459	335	460
Ukraine	428	458	419	428	463	465
USA	3,376	3,350	3,314	3,291	3,040	3,034

Sources: *MEG to USDA and national data.*

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

	2020	2021	2022	2023	2024	2025p
Austria	21.0	21.5	21.8	22.3	23.2	23.6
Czech Republic	25.5	24.9	25.2	25.0	26.0	26.9
Denmark	27.3	26.7	25.0	24.0	24.0	23.5
Finland	24.4	25.5	26.2	26.7	27.6	28.0
France	28.4	28.4	28.2	28.8	30.9	31.8
Germany	20.6	20.2	18.8	19.9	20.9	22.3
Greece	20.0	21.0	22.0	23.0	25.0	27.0
Hungary	33.0	33.5	33.0	34.0	35.0	35.8
Ireland	35.0	36.0	37.0	37.6	38.0	39.5
Italy	21.7	21.5	20.5	21.3	22.2	23.1
Latvia	.	.	28.0	28.0	30.0	29.5
Lithuania	26.0	27.0	29.0	31.0	30.0	29.8
Netherlands	22.1	22.0	21.4	21.6	22.0	21.9
Poland	33.4	28.3	29.8	35.2	35.3	36.0
Portugal	38.0	37.8	38.8	39.0	40.0	41.0
Slovakia	21.5	20.0	24.0	27.0	29.0	27.0
Spain	31.1	29.9	29.0	30.0	32.0	34.0
Sweden	21.8	23.2	22.9	23.5	24.1	23.4
EU 27	**26.8**	**26.6**	**26.8**	**27.7**	**28.8**	**29.3**
Switzerland	18.4	19.2	19.4	19.0	20.6	21.4

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

8. Self-sufficiency in poultry meat (%)

	2020	2021	2022	2023	2024	2025p
Austria	77	78	77	73	74	72
Czech Republic	74	76	76	72	69	72
Finland	98	98	101	98	97	98
France	88	87	81	89	81	79
Germany	102	101	106	102	98	91
Greece	82	82	99	93	93	93
Hungary	123	129	126	125	130	137
Ireland	102	101	103	.	.	.
Italy	107	108	100	107	106	105
Latvia	61	63	61	61	63	67
Lithuania	100	94	96	94	97	99
Netherlands	160	158	160	160	152	150
Poland	242	268	266	227	257	250
Spain	106	109	104	102	101	101
Sweden	116	110	121	110	105	112
EU 27	**114**	**112**	**110**	**108**	**109**	**109**

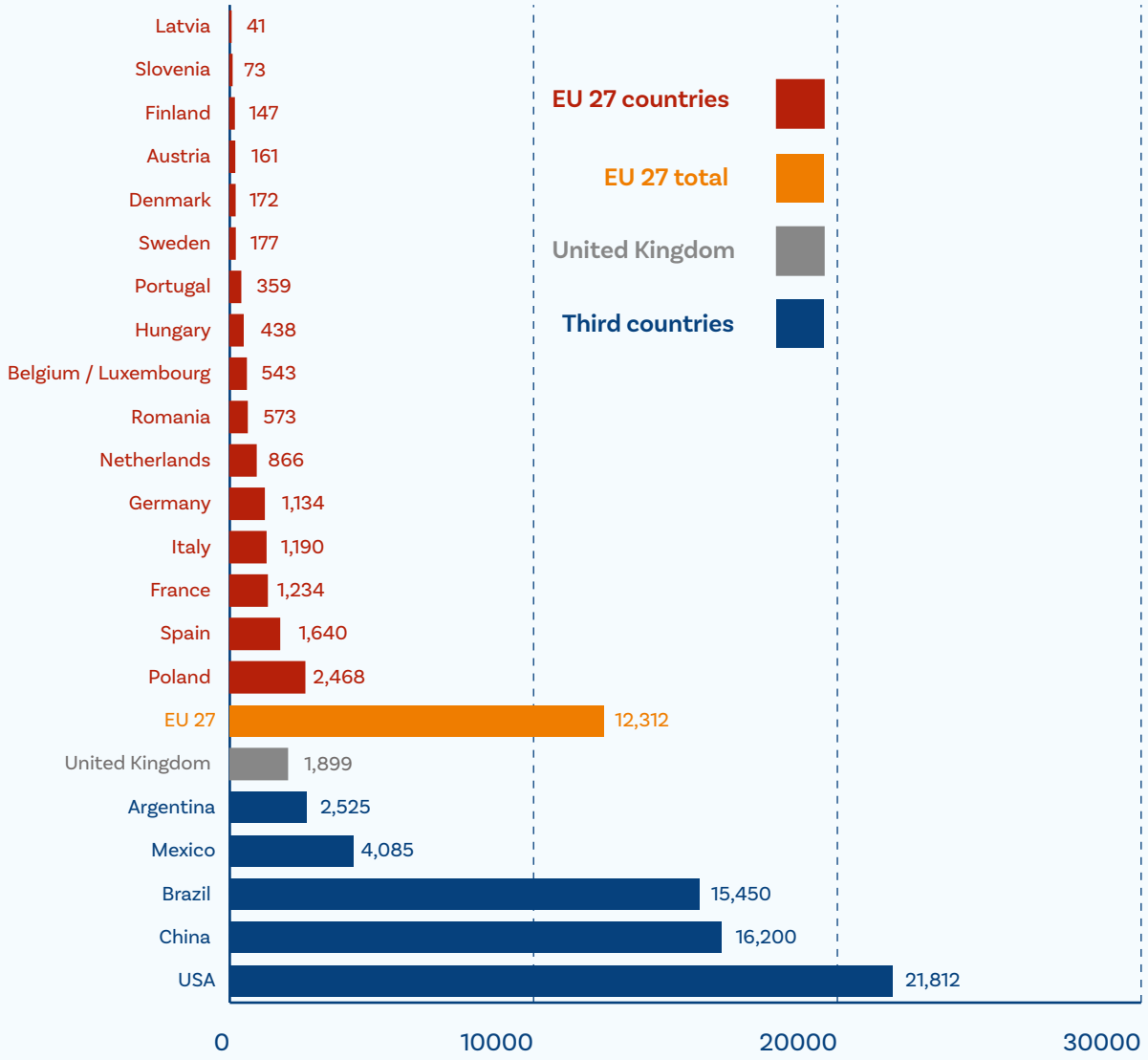
Note: *Partial provisional or estimated.*
Sources: *MEG according to EU Commission, national data, FAO and EUROSTAT.*

9. Broiler meat production in the EU and third countries (slaughterings ´000 tonnes carcass weight)

	2020	2021	2022	2023	2024	2025p
Austria	.	150	147	150	158	161
Belgium / Luxembourg	441	448	442	421	532	543
Bulgaria	87	91	91	91	96	113
Cyprus	27	27	27	28	28	29
Czech Republic	161	168	161	159	160	177
Denmark	165	163	152	159	163	172
Estonia	22	23	23	24	.	.
Finland	137	139	138	135	140	147
France	1,130	1,143	1,114	1,128	1,246	1,234
Germany	1,074	1,089	1,079	1,090	1,104	1,134
Greece	237	236	245	272	276	316
Hungary	354	368	349	379	402	438
Ireland	152	148	145	149	162	174
Italy	1,067	1,069	994	1,083	1,134	1,190
Croatia	57	59	59	60	67	75
Latvia	35	35	37	37	38	41
Lithuania	97	85	84	83	83	94
Malta	4	4	4	5	5	5
Netherlands	996	869	864	850	841	866
Poland	2,200	2,097	2,232	2,285	2,433	2,468
Portugal	297	300	314	323	341	359
Romania	400	452	475	501	533	573
Slovakia	80	81	86	86	90	90
Slovenia	67	67	68	70	73	73
Spain	1,401	1,331	1,350	1,393	1,518	1,640
Sweden	167	180	167	167	174	177
EU 27	**11,006**	**10,818**	**10,847**	**11,125**	**11,821**	**12,312**
United Kingdom	1,779	1,841	1,847	1,858	1,867	1,899
Argentina	2,215	2,290	2,319	2,436	2,485	2,525
Brazil	13,880	14,500	14,465	14,900	15,000	15,450
China	14,600	14,700	14,300	14,800	15,350	16,200
India	4,473	4,618	4,780	4,995	5,019	.
Indonesian	3,638	3,615	4,108	4,056	4,179	.
Iran	2,430	2,106	2,090	2,117	2,269	.
Mexico	3,596	3,665	3,763	3,888	3,990	4,085
Russia	4,577	4,617	5,308	5,340	5,457	
Thailand	3,250	3,220	3,300	3,450	3,490	3,590
USA	20,255	20,391	20,994	21,082	21,343	21,812
World	**118,865**	**119,612**	**122,287**	**124,659**	**128,307**	**130,000**

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

Broiler meat production in EU and third countries (slaughterings ´000 tonnes carcass weight) in 2025



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

	2020	2021	2022	2023	2024	2025p
Austria	15.1	15.4	15.8	16.9	17.8	.
France	20.7	21.6	22.6	23.1	24.5	25.8
Germany	13.9	14.1	13.2	14.3	15.3	16.8
Netherlands	20.6	20.4	20.0	20.2	20.6	.
EU 27	**21.1**	**21.1**	**21.6**	**22.5**	**23.7**	**24.3**
Third Countries						
Argentina	44.8	46.7	47.1	50.5	50.7	52.5
Brazil	48.0	49.1	47.7	48.0	47.7	49.2
China	10.4	10.3	9.9	10.3	10.4	10.7
India	2.8	.	.	.	.	.
Japan	21.8	22.7	23.0	22.9	23.7	24.2
Mexico	34.9	35.8	36.3	37.7	38.3	39.0
South Africa	31.2	29.9	29.5	28.6	29.2	29.5
USA	50.1	50.5	51.8	52.0	53.3	54.3

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

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

	2020	2021	2022	2023	2024	2025p
Austria	16	18	18	17	17	17
Belgium / Luxembourg	7	7	6	7	.	.
Bulgaria	2	2	2	2	2	2
Croatia	17	17	18	18	.	
Cyprus	0	0	0	0	0	0
Czech Republic	2	2	2	2	2	2
Denmark	1	1	0	0	0	0
Finland	8	9	9	9	9	8
France	321	295	245	240	256	244
Germany	466	432	397	408	399	368
Greece	3	3	3	2	2	2
Hungary	81	73	64	56	54	58
Ireland	14	15	15	16	17	17
Italy	313	298	211	243	246	236
Malta	0	0	0	0	0	0
Poland	407	363	409	367	349	336
Portugal	47	49	46	45	45	42
Romania	15	15	20	20	.	.
Slovakia	1	1	3	3	.	.
Slovenia	6	6	5	6	5	.
Spain	226	225	232	229	216	246
Sweden	5	5	5	5	.	.
United Kingdom	174	125	117	110	118	.
Brazil	160	157	162	133	151	.
Canada	153	150	150	159	159	.
Mexico	17	18	18	19	19	.
USA	2,605	2,521	2,369	2,480	2,323	2,197

Note: *Partial provisional or estimated,*
Source: *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)

	2020	2021	2022	2023	2024	2025p
Austria	4.5	4.6	4.7	4.4	4.4	.
France	4.5	4.1	3.6	3.5	3.4	3.4
Germany	5.4	4.8	4.3	4.4	4.3	4.2
EU 27	**4.3**	**4.1**	**3.9**	**3.9**	**3.8**	**3.7**
USA	7.1	6.9	6.6	6.7	6.3	6.0

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

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

	2020	2021	2022	2023	2024	2025p
Austria	0.6	0.9	1.2	1.1	1.1	1.2
Belgium / Luxembourg	0.1	0.1	0.1	0.1	0.1	.
Denmark	1.3	0.0	0.1	0.1	0.1	0.1
France	192.0	177.0	117.8	136.5	187.8	170.0
Germany	28.9	24.1	24.3	23.5	21.7	19.9
Greece	0.1	0.0	0.0	0.0	0.0	0.0
Ireland	5.0	5.5	5.5	6.0	.	.
Italy	1.7	2.9	2.3	2.5	2.6	2.6
Portugal	9.6	9.7	9.6	11.9	10.7	9.7
Spain	4.7	5.0	3.2	5.8	6.0	.
Bulgaria	19.8	19.9	22.4	24.9	22.9	18.5
Czech Republic	12.0	10.3	11.0	10.5	.	.
Hungary	63.4	89.6	54.5	64.2	76.3	50.9
Lithuania	0.0	0.0	0.0	0.0	0.0	0.0
Poland	63.5	57.5	65.5	67.7	76.2	70.8
Slovakia	0.6	0.6	0.6	0.6	.	.
EU 27	**500.0**	**495.0**	**395.0**	**430.0**	**470.0**	**430.0**
United Kingdom	22.7	21.3	19.7	18.1	27.3	.
World	**6,154.0**	**6,220.7**	**6,667.8**	**7,043.5**	**7,334.5**	**.**

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

14. EU27 poultry meat imports by product type, 2025, 2024, 2020, 2015

Product definition	Quantity (tonnes carcass weight equivalent)				Value (Euros per kg)	
	2025	2024	2020	2015	2025	2024
Total Product Groups	920,494	895,992	804,772	961,508	2.80	2.44
Frozen chicken meat	255,672	213,683	176,358	220,626	2.32	2.06
Poultry salted meat in brine	220,065	247,226	227,658	315,547	2.39	1.82
Poultry preparations	182,907	157,967	114,052	203,286	5.06	5.19
Fresh chicken meat	176,529	190,649	159,784	121,590	1.51	1.30
Poultry fats	54,496	41,257	13,953	7,649	1.03	0.82
Chicken offals	16,944	21,572	75,169	46,655	0.41	0.47
Frozen turkey meat	8,795	14,797	21,531	22,496	3.71	2.73
Fresh turkey meat	1,947	5,576	7,414	16,580	2.48	1.33
Live poultry	1,534	1,424	2,335	1,570	1.82	0.70
Chicks	1,140	1,252	1,530	1,018	144.76	111.34
Turkey offals	228	407	1,643	1,108	0.90	0.92
Frozen duck & goose meat	183	57	2,240	1,951	2.89	6.78
Duck & goose offals	28	69	313	767	2.19	1.21
Fresh duck & goose meat	24	52	666	564	2.12	2.76
Fatty duck & goose liver	3	2	35	10	18.46	43.82
Other poultry fresh or frozen meat	1	3	89	88	3.76	5.60
Other poultry offals	0	0	0	0	6.50	0.35

Source: *European Commission:* https://agridata.ec.europa.eu/extensions/DashboardPoultry/PoultryTrade.html

15. EU27 poultry meat exports by product type, 2025, 2024, 2020, 2015

Product definition	Quantity (tonnes carcass weight equivalent)				Value (Euros per kg)	
	2025	2024	2020	2015	2025	2024
Total Product Groups	2,099,608	2,147,491	2,520,753	2,145,933	2.57	2.31
Frozen chicken meat	1,156,293	1,156,768	1,504,550	1,264,155	1.10	1.11
Fresh chicken meat	497,449	501,029	446,936	348,600	3.55	3.07
Poultry preparations	180,914	180,606	171,649	145,627	7.11	6.65
Frozen turkey meat	95,119	100,556	134,003	130,798	1.96	1.54
Chicken offals	76,151	102,596	136,155	84,090	0.86	0.92
Fresh turkey meat	33,745	42,628	30,452	39,993	5.06	3.40
Frozen duck & goose meat	19,152	22,236	23,391	32,614	3.28	2.89
Poultry fats	12,321	14,329	17,511	21,911	2.01	1.86
Turkey offals	7,443	7,699	6,776	19,785	1.32	1.11
Chicks	6,846	6,003	6,547	9,237	67.64	56.75
Poultry salted meat in brine	5,432	4,510	30,665	29,789	1.82	1.69
Duck & goose offals	2,080	2,558	3,925	4,481	2.47	2.61
Live poultry	2,032	1,176	1,559	3,526	3.27	3.38
Other poultry fresh or frozen meat	1,810	1,918	1,783	2,270	4.61	4.49
Fresh duck & goose meat	1,528	1,436	3,019	6,421	6.87	8.34
Fatty duck & goose liver	1,222	1,385	1,655	2,509	36.82	38.56
Poultry salted livers in brine	40	19	28	3	8.22	11.64
Other poultry offals	32	39	150	122	7.25	5.02

Source: *European Commission:* https://agridata.ec.europa.eu/extensions/DashboardPoultry/PoultryTrade.html

16. EU aggregate meat balance sheet, 2020–2025 ('000,000 tonnes carcass weight)

	2020	2021	2022	2023	2024	2025p
Total meat						
Gross indigenous production	48.5	48.5	46.7	45.4	46.4	47.1
Consumption	38.3	37.9	37.4	37.6	38.4	39.6
Consumption per capita, kg	84.8	82.7	85.1	84.1	86.3	88.1
Self-sufficiency rate,%	128.3	128.0	125.0	120.5	120.8	118.7
Beef and Veal						
Gross indigenous production	7.2	7.1	6.9	6.6	6.8	6.4
Consumption	6.3	6.2	6.0	5.9	5.9	5.9
Consumption per capita, kg	14.4	13.9	13.6	13.1	13.2	13.2
Self-sufficiency rate,%	106.0	116.1	114.2	113.9	113.8	107.5
Pork						
Gross indigenous production	23.4	23.7	22.3	21.0	21.4	22.1
Consumption	17.3	17.3	17.0	16.6	17.0	17.6
Consumption per capita, kg	39.8	38.6	38.2	37.1	37.8	39.1
Self-sufficiency rate,%	131.1	137.4	130.7	125.9	126.0	125.6

Source: *AMI Agrarmarkt Informations-Gesellschaft mbH.*

17. Gross domestic production of meat in the EU and third countries ('000 tonnes carcass weight)

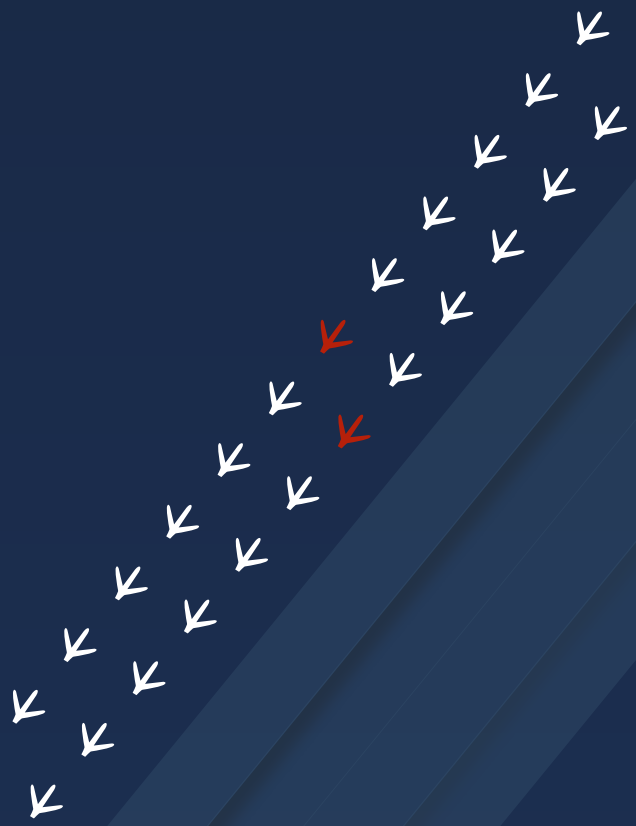
	2020	2021	2022	2023	2024	2025p
Austria	918	913	885	858	866	873
Belgium / Luxembourg	1,949	1,901	1,862	1,809	1,893	1,886
Bulgaria	209	215	229	225	250	273
Croatia	298	284	259	249	253	265
Cyprus	84	87	79	78	77	77
Czech Republic	592	601	594	576	594	610
Denmark	2,220	2,457	2,360	2,063	2,191	2,237
Estonia	167	170	173	170	169	162
Finland	434	441	433	415	423	430
France	6,436	6,371	6,161	5,944	6,061	6,068
Germany	8,291	8,044	7,408	7,160	7,260	7,299
Greece	516	540	547	560	511	555
Hungary	1,256	1,308	1,213	1,229	1,103	1,168
Ireland	1,315	1,295	1,318	1,242	1,317	1,272
Italy	3,855	3,911	3,556	3,445	3,554	3,590
Latvia	100	99	105	106	99	99
Lithuania	244	231	224	221	222	223
Malta	11	11	10	11	12	12
Netherlands	3,544	3,412	3,212	3,135	2,780	2,667
Poland	5,377	5,305	5,222	5,170	5,562	5,647
Portugal	836	865	855	836	889	901
Romania	1,186	1,107	1,125	1,114	1,157	1,243
Slovakia	272	264	241	238	278	296
Slovenia	168	171	168	167	153	164
Spain	7,749	7,897	7,859	7,697	8,049	8,414
Sweden	626	637	643	636	629	623
EU 27	**48,503**	**48,537**	**46,741**	**45,354**	**46,352**	**47,054**
Argentina	6,282	6,110	6,316	6,455	6,386	6,453
China	77,896	91,845	94,701	98,680	99,396	101,598
USA	48,696	48,841	49,149	48,885	49,199	48,930
World	**338,576**	**355,715**	**362,369**	**368,248**	**378,145**	**383,531**

Source: *MEG to AMI, EUROSTAT, FAO and national statistics.*

1966–2026

60 years of progress.
One voice.

Representing the European poultry meat sector in the EU and beyond.



AVEC
THE VOICE OF EUROPE'S POULTRY MEAT SECTOR

Association of Poultry Processors and Poultry Trade in the EU

AVEC secretariat
Rue du Luxembourg 47–51
B-1050 Brussels
Belgium

Phone +32 2 238 10 82

email: avec@avec-poultry.eu

www.avec-poultry.eu

FOLLOW US