



EU poultry meat

Paul Lopez - President

a.v.e.c. - Association of Poultry Processors
and Poultry Trade in the EU countries

www.avec-poultry.eu



Work of a.v.e.c.

a.v.e.c.
represents the
interests of
poultry meat
companies,
processors and
trade in the EU

- Animal health
- Animal welfare
- Food safety
- Environment/Sustainability
- Quality of the products
- Trade with 3rd countries



Members of avec



a.v.e.c. represents the majority of poultry interests in the European Union.

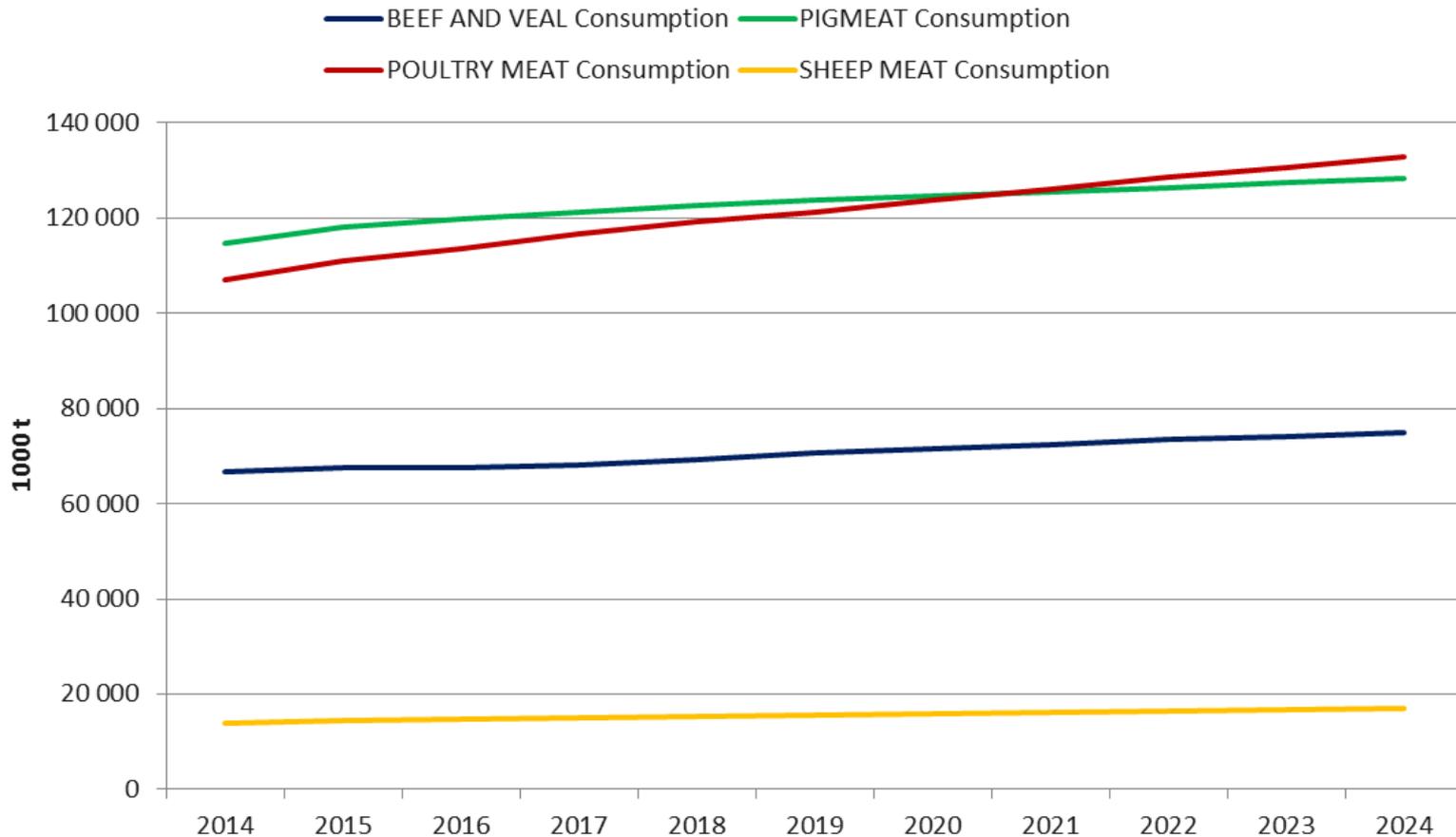
Our members are national organisations representing poultry companies, processors and trade.

Currently, we have 18 members from 16 EU Member States, representing approximately 95% of European poultry meat production.



Poultry – the meat of the future

The trends in global meat consumption

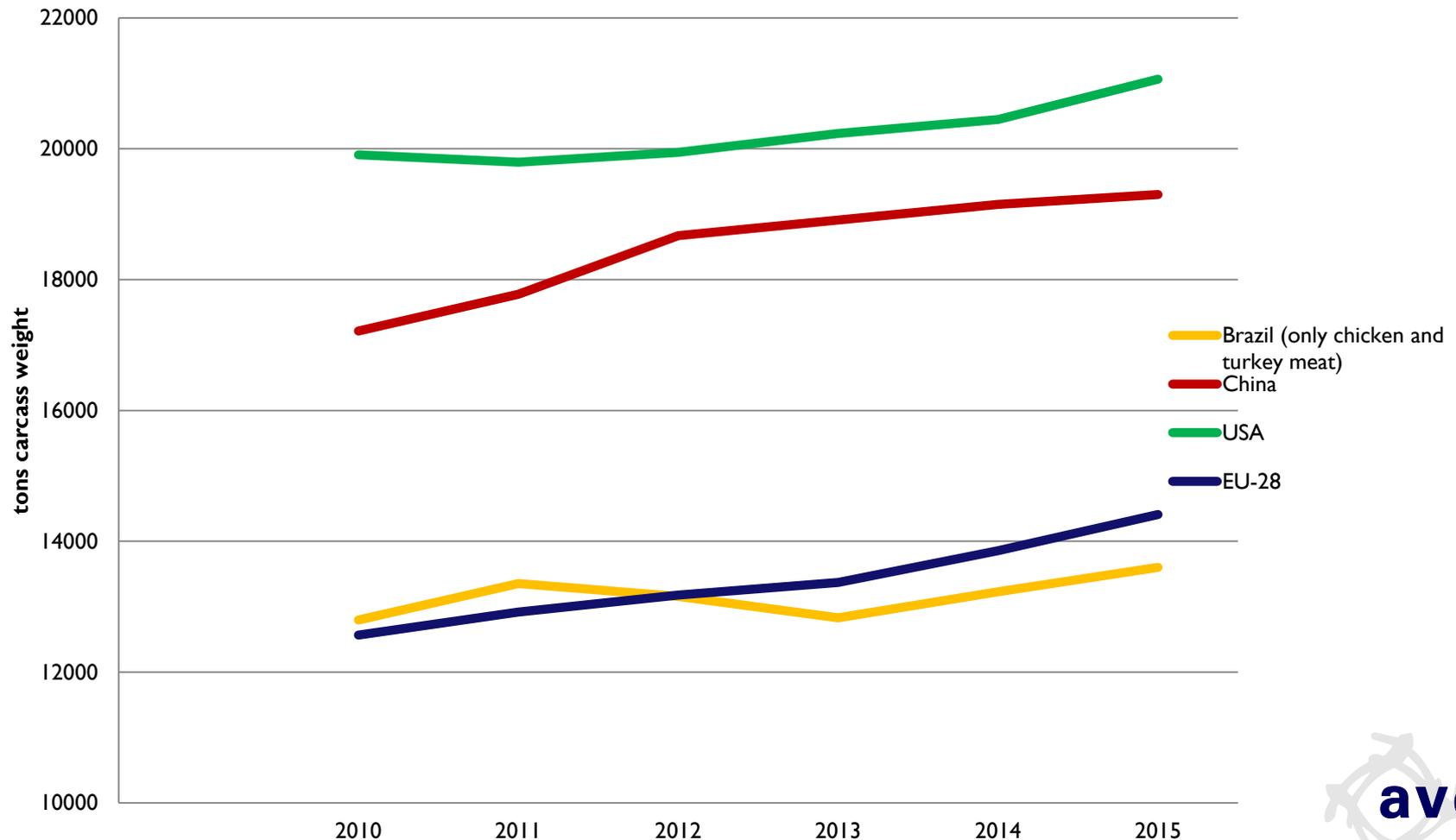


OECD/Food and Agriculture Organization of the United Nations (2015),
OECD-FAO Agricultural Outlook 2015



The global market

The big poultry meat producers



Sources: avec annual report 2016 - <http://www.avec-poultry.eu/annual-reports-overview/annual-report-2016>

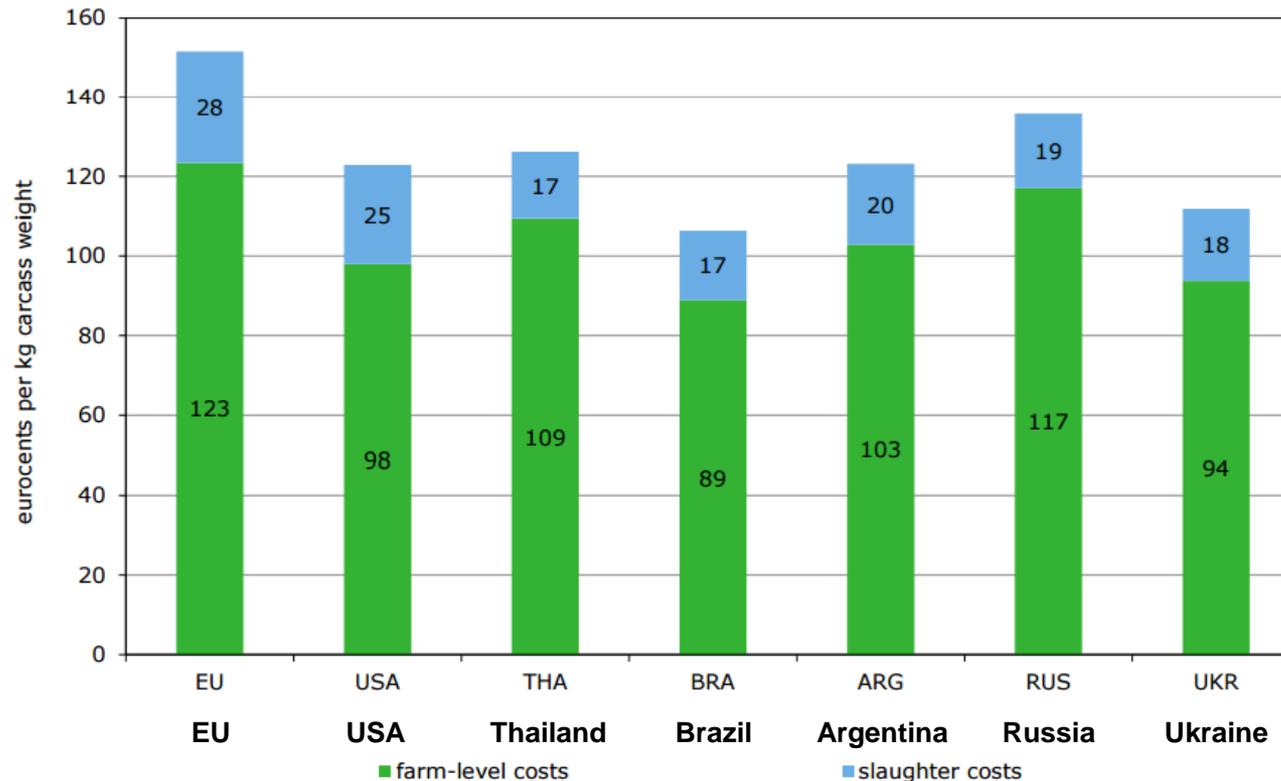
The global trade in poultry meat

World poultry map



Production costs

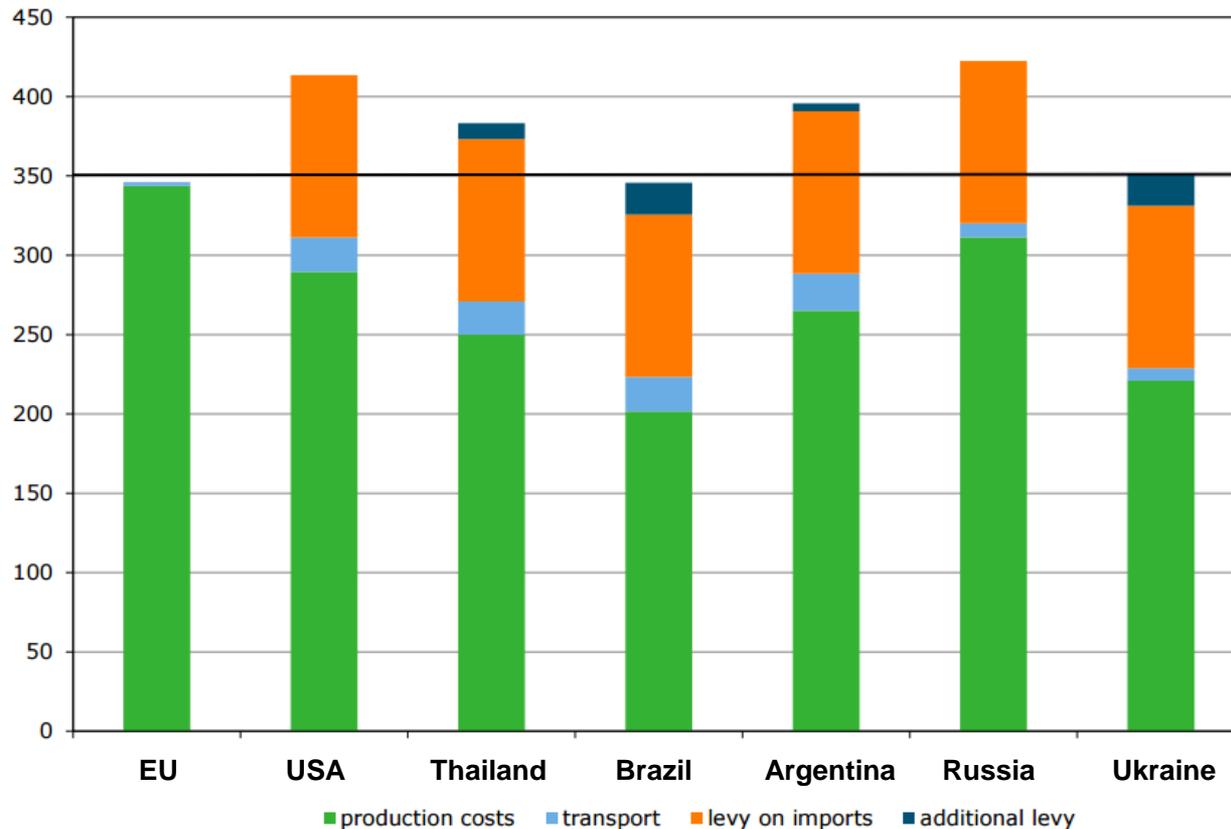
Costs of primary production and slaughter of broilers in eurocents per kg slaughter weight in EU and six third countries in 2015



Horne, P.L.M. van, 2017. *Competitiveness of the EU poultry meat sector, base year 2015*; International comparison of production costs. Wageningen, Wageningen Economic Research, Report 2017-005. 36 pp.; 14 fig.; 11 tab.; 16 ref.
<http://www.avec-poultry.eu/communications>

Competitiveness ...

Offer price of breast fillet in Germany from EU average (horizontal line) and non-EU countries in eurocents per kilogram in 2015



Horne, P.L.M. van, 2017. *Competitiveness of the EU poultry meat sector, base year 2015*; International comparison of production costs. Wageningen, Wageningen Economic Research, Report 2017-005. 36 pp.; 14 fig.; 11 tab.; 16 ref.
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EU market threatened by imports

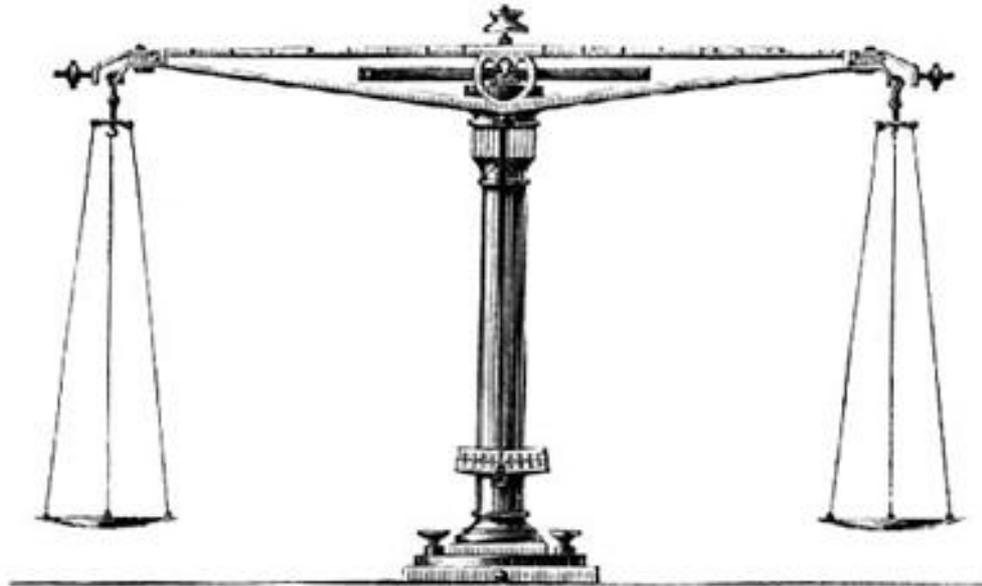
- All competitors want access to the EU market: strong demands from Ukraine, Brazil, Thailand,...
- EU is the only market for breast
- TTIP: in the “freezer” for the time being...how long?
- Mercosur is the biggest threat / case of Canada
- The Commission should grant access only to countries where EU has reciprocal interest to export:

 South Africa, China

Free trade

Fair trade

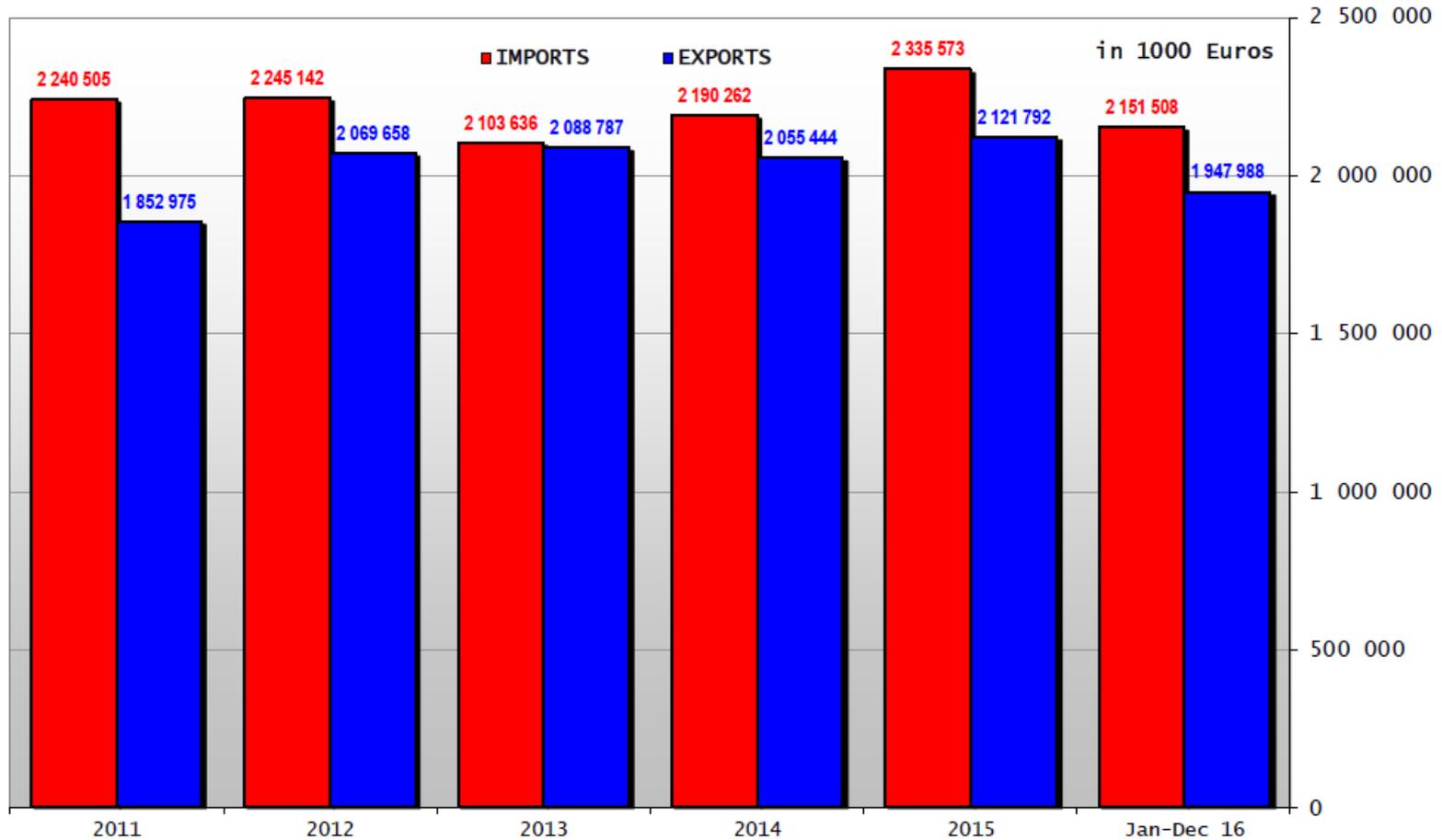
We want fair competition!



Production cost in
EU due to public
concern

Import levies

EU poultry meat trade balance (in 1000 €)



Consequences of Brexit

- 30 % (40 % in €) of the imports from 3rd countries (BR and TH) going to UK
 - UK imports from the EU more than 550 000 T of poultry meat
 - Also important quantities arriving to EU continental harbours, going to UK once processed = **not visible in the statistics**
- ➡ a.v.e.c. advocates the STATUS QUO and the maintaining of the trade flows to avoid a complete destabilisation of the EU market

Avian Influenza

- Dramatic impact in whole EU
- FR and HU are the countries which are the most affected, especially duck production for foie gras
- The pressure seems to be decreasing now, but we have to remain vigilant

➔ Positive aspect: Trade in the internal market continues thanks to the efforts of the EU Commission and the mutual trust of the MS



Avian Influenza

What to do in the future as AI seems to be endemic?

- Biosecurity = most important, but is it sufficient?
- Respect of OIE (World Organisation for Animal Health) rules by trade partners is key (regionalisation + reopening after 3 months)
- Need for a change in OIE rules: stop notification of LPAI - backyard flocks – wild birds
- Issue of the 12 weeks
- Need for compensations for downstream parts of the chain

Antimicrobial Resistance

- 2 core principles:
 - “Holistic” approach: one health
 - “Prevention is better than cure”
- First focus should be on antibiotics creating human resistance (WHO list)
- a.v.e.c. is supporting the Responsible Use of veterinary medicines hand-in-hand with good bio-security practices
- New challenge for the EU and global poultry meat industry to limit antibiotic use while preserving the welfare of the birds

Animal Welfare

- Commission should focus on harmonisation and avoid addition rules that may **harm industry competitiveness**.
- An appropriate impact assessment of new animal welfare laws.
- Application of identical standards to imports are key.
 - a.v.e.c. is willing to cooperate with the EU Institutions to develop a sustainable livestock system.
 - a.v.e.c. is actively participating to several projects on best practices on animal transport

MDM (Mechanically Deboned Meat)

- The current EU interpretation is devaluating part of poultry meat and it is **weakening the competitive position of EU industry.**
- Every delay in the process will continue producing **extra costs** and **economically harming the sector**
- Plea to be open to consider **innovation** and **new technologies: deboning wishbone with a knife is meat, but deboning it with a machine would not be meat???**

Food Safety - Campylobacter

- PHC (process hygiene criteria) for Campylobacter has been adopted on 29/03/2017
- It shall apply from 1 January 2018.
- a.v.e.c. welcomes the decision to undertake a step by step approach (PHC gradually stricter in time)
- Strongly support the EC proposal to set a whole chain approach - all stakeholders share responsibility.

Food Safety - Campylobacter

- a.v.e.c. recommends:
 - To define corrective measures in case of non-compliance.
 - To wait for the results for at least 24 months before setting stricter future target.
 - To allow flexibility to avoid unbalanced level playing field in the EU
 - To invest in research and more consumer education



Clear refusal of the use of decontamination

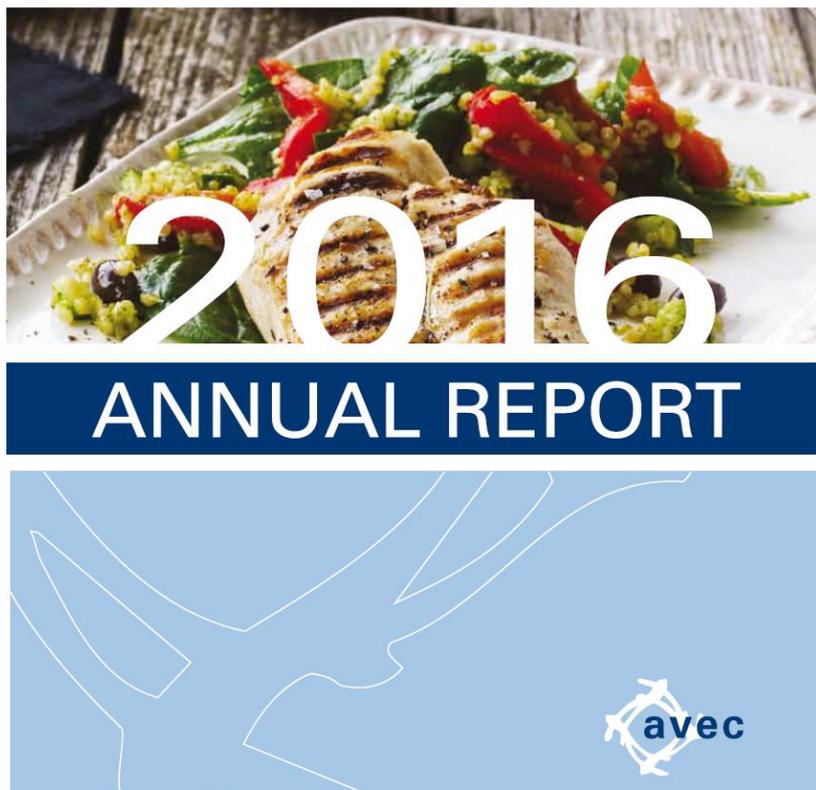


Conclusion

- We are committed to **keep the EU consumer confidence** in our products
- To this end, we have to remain strong on EU principles: **farm to fork approach** is the core principle fully supported by **a.v.e.c.** for many years
- We want to keep **poultry meat production in the EU**

a.v.e.c. Annual Report 2016

- <http://www.avec-poultry.eu/annual-reports-overview>



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Thank you for your attention



**Celebrate
every day
with
POULTRY !**

