



# Annual report 2024



# 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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# Introduction







# Introduction

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2024 marks the conclusion of a five-year legislative term. The EU Commission, starting in 2019, launched the ambitious Green Deal followed by the Farm to Fork strategy in 2020. Despite high expectations, consultation with stakeholders from the agriculture and food production sectors was not sufficiently taken into account.

Though much of the planned legislation was to be enacted by the end of 2023, progress was hindered by several factors, including the COVID-19 pandemic and the war in Ukraine. New priorities, such as food security, started to gain traction. And since many of the initiatives in the Farm to Fork strategy would have damaged the competitiveness of European farmers and food producers, decision-makers began to reevaluate them. Another factor that may have influenced politicians was the protests held by farmers in Brussels at the start of 2024. The urban view of farmers as polluters who do not care about animal welfare had become too much. Farmers demanded to be recognised for the extremely important contribution they make to Europe: providing its food.

Faced with this barrage of conflicting opinions, AVEC's role has been to present the facts grounded in scientific evidence. We firmly believe that robust policy decisions must be based on science. This approach can be challenging in today's world of 'bullet-point communication', where messages need to be concise to gain attention. Sustainable food production is a complex subject that demands a holistic understanding, making it difficult to

convey its intricacies in a few soundbites. Nonetheless, we made every effort to communicate the importance of evidence-based decisions.

In November 2023 AVEC hosted the 'Sustainability in practice: spotlight on European poultry' event in Brussels. This event highlighted the challenges faced by farmers and food producers, showcasing their efforts to improve environmental, economic, and social aspects through case studies from Germany, France and Spain.

The 'Costs and Implications of the European Chicken Commitment (ECC)' study conducted independently by RSK ADAS Ltd (ADAS) and published in May 2024, examined the likely impact of fully adopting the ECC requirements across EU chicken production. The study revealed that a full transition to an ECC-based production system would inevitably lead to higher prices, with two likely effects: the exclusion of a significant portion of consumers from buying chicken meat and a dramatic increase in imports from third countries with lower animal welfare standards. Furthermore, it would lead to greater use of water, feed and land, resulting in an increase in the sector's emissions of almost 25%.

These results were presented in a webinar which attracted over 300 participants, including several policy-makers. The message conveyed was clear: **animal welfare** is paramount and European poultry meat producers are committed to its continuous improvement. However, economic and environmental impacts should be carefully considered when

proposing future legislation. AVEC believes that the way to achieve progress is by introducing objective output-based animal welfare indicators grounded on scientific evidence.

Turning to **animal health**, the overwhelming challenge we face is highly pathogenic avian influenza (HPAI). In December 2023, the World Association for Animal Health (WOAH) published a policy brief which included the following observations:

*The rapidly evolving nature of avian influenza and changes in its patterns of spread require a review of existing prevention and control strategies. To effectively contain the disease, protect the economic sustainability of the poultry sector and reduce potential pandemic risks, all available tools must be reconsidered – including vaccination.*

The European poultry sector has been leading the way in HPAI vaccination. France initiated a successful national vaccination programme in October 2023 targeting ducks for commercial meat production. This programme will be continued, and other countries including the Netherlands, Italy and Hungary are conducting vaccination trials for laying hens, turkeys and geese respectively. Unfortunately, vaccination against HPAI still creates a lot of problems for international trade. AVEC is working closely with all European stakeholders to ensure that science – rather than politics – forms the basis of the global battle against HPAI.

On the subject of **trade**, following the liberalisation of all imports from Ukraine decided in the EU Autonomous Trade Measures (ATM), there has been a huge increase in imports of poultry meat to Europe. After extensive discussions with the EU Commission, trigger levels for poultry meat for 2023 and 2024 to limit imports to a fair level have been included.

European poultry meat producers are committed to supporting Ukrainian citizens and society in the face of the ongoing war. AVEC is ready to discuss future trade cooperation between the EU and Ukraine in order to find a balanced solution that is based on a level playing field and identical rules for producing poultry meat.

**What will the future hold? The recently released OECD-FAO Agricultural Outlook 2024-2033 predicts a 15% increase in poultry meat consumption globally from 2023 to 2032, with a 4% increase in Europe.**

So both the world – and Europe – need more poultry meat. We are committed to embracing a sustainable, transparent and innovative poultry sector within the European Union. We are working to strengthen the European poultry sector by upholding the values of resource efficiency, EU production, animal welfare and consumer choice. This not only serves the needs of European citizens, but also contributes to a healthier planet, and sets a global example for a brighter future for all.



**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'.



# 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 2023–24

Country	Board member	Deputy board member
AUSTRIA	Harald Schliessnig	Stefan Weber
BELGIUM	Philip Eeckman	Ann Truyen
DENMARK	Stig Munck Larsen	Michael Juhl Jørgensen
FINLAND	Terhi Virtanen	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	Philip Wilkinson	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**

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## FRANCE

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## GERMANY

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## HUNGARY

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## ITALY

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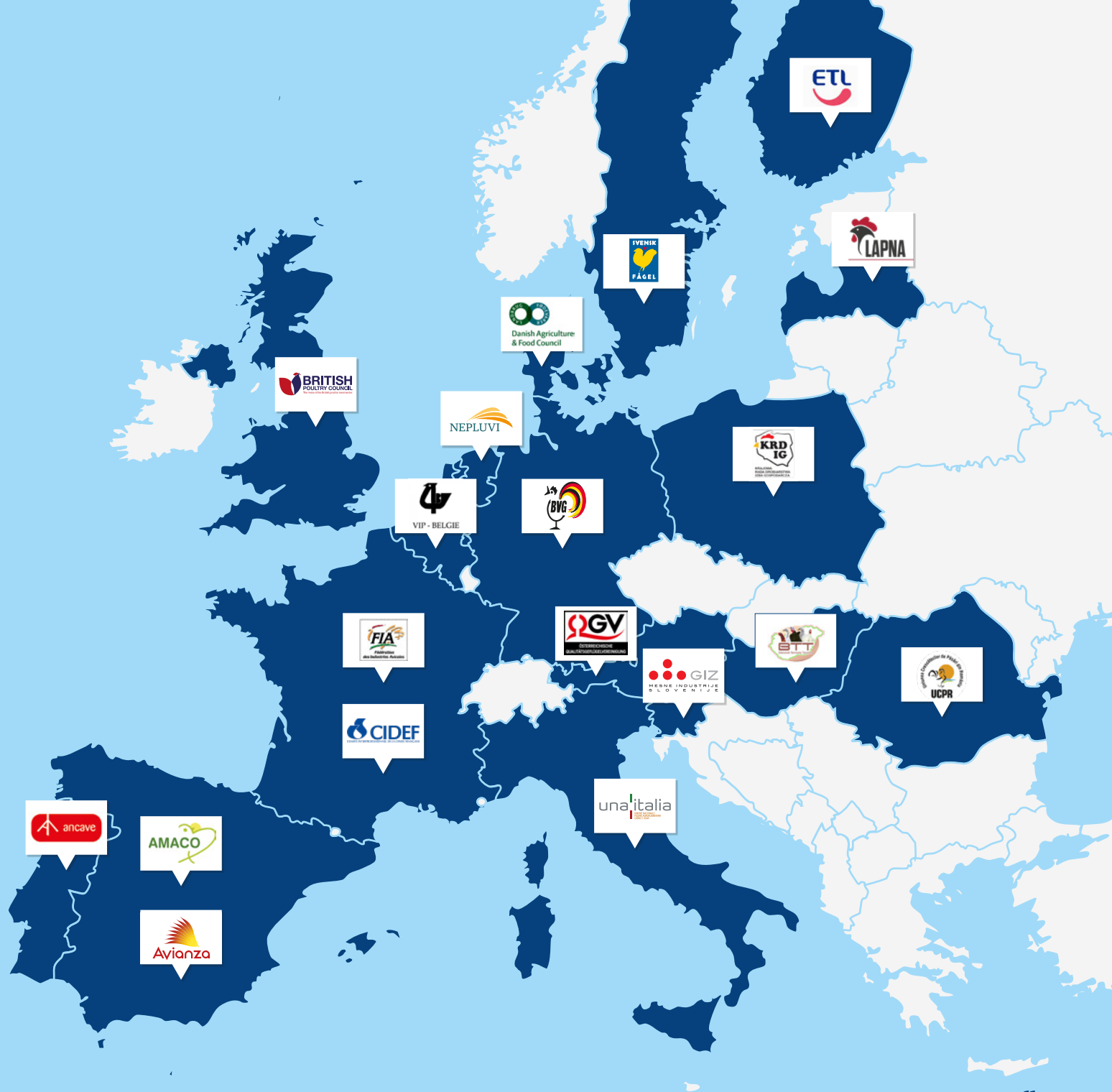
## UNITED KINGDOM

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# 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.



Furthermore a Working Group on **Ducks** is under development.





# 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.



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



**Magnus Swalander**  
President of EPB



# What we do

*An overview of the main themes AVEC has worked on during 2023-2024. 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 AVEC working group on animal health and animal welfare has been remarkably active over the past year.

Animal welfare was at the centre of many debates in the run-up to December 2023, when the Commission submitted its proposal on the welfare of animals during transport. The proposal included some controversial elements, and AVEC members were proactive from the start reviewing the EFSA scientific opinions on transport and welfare of poultry, which directly influenced the Commission's proposal. Additionally, we organised field visits and several meetings with policy makers to showcase the best practices our sector has developed for producing sustainable and welfare-friendly poultry meat.



**Harald Schliessnig**

Animal Health and Animal Welfare Working Group Chair

In May 2024, AVEC published a study on the costs and implications of the European Chicken Commitment (ECC) to support strategic dialogue around sustainable poultry meat production. The study found that a full transition to an ECC-based production system would inevitably lead to higher prices and higher GHG emissions. This would potentially exclude a significant proportion of consumers from buying chicken meat and lead to a large increase in imports from third countries with lower animal welfare standards. It is essential that policy-makers consider impacts such as these when proposing future legislation.

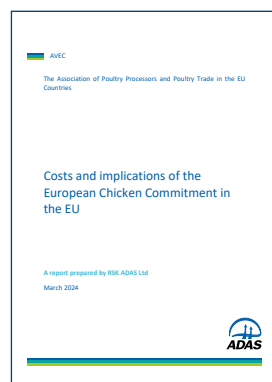


# The EU poultry sector has been leading the way

**“The EU poultry sector has been leading the way in highly pathogenic avian influenza (HPAI) vaccination.”**

Turning to animal health, the poultry sector has been leading the way in highly pathogenic avian influenza (HPAI) vaccination. France initiated a successful national vaccination programme in October 2023 targeting ducks for commercial meat production. This programme will be continued, and other countries including the Netherlands,

Italy and Hungary are conducting vaccination trials for laying hens, turkeys and geese respectively. In parallel, EFSA issued two scientific opinions. The first, published in October 2023, assessed various vaccination strategies and confirmed that preventive vaccination, as seen in the French market, is the most effective measure for prevention. The second opinion, released in April 2024, evaluated the surveillance programme and validated the surveillance plan defined in EU legislation (under the Animal Health Law) and implemented by France. This is expected to help with the lifting of current trade bans and the prevention of future ones.



**Find out more about the ECC study**

## Future priorities

The working group will monitor discussions at the European Parliament and Council on the Commission proposal regarding the welfare of animals during transport. It will advocate for sustainable and economically viable transport practices for our sector.

- Actively promote outcome-based welfare indicators and continuous improvement.
- Monitor outbreaks of HPAI and national vaccination plans.
- Keep a close eye on the contamination of US dairy cows with HPAI.

# Turkey

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## Assessing animal welfare on our turkey farms

In September 2023, the European Commission tasked EFSA with issuing a scientific opinion on the welfare of turkeys on farms. Learning from recently drafted opinions, EFSA adapted its process to involve stakeholders early on. In November 2023, AVEC, working alongside ELPHA and EPB, participated in a stakeholder meeting for the turkey welfare mandate. Since then, AVEC members have provided relevant data and figures and coordinated fact-finding studies as part of the European Commission's annual audit programme.

Three fact-finding missions were conducted in the first half of 2024, with auditors visiting Italy, Germany and France. These visits gathered information on different production systems and management practices used in turkey meat production. They focused on identifying best practices and welfare indicators for turkeys. The entire production process, from hatchery to farm and slaughterhouse, was examined. The resulting reports provide an overview of current practices, and will shape future regulations for turkey farming in Europe. While the process is likely to be lengthy, it is crucial to promote and communicate the high standards we apply daily to support the economically fragile turkey meat sector.



**Yann Brice**  
Turkey Working Group Chair

## Industrial Emissions Directive

In November 2023 the European Parliament and the Council of the European Union reached an agreement on the application of the Industrial Emissions Directive (IED). This poses a significant threat to European turkey farms. Lowering the threshold from 40,000 to 9,333 animals means some farms will have to switch from a declaration system to an authorisation system. The new threshold classifies farms with 9,000 animals as industrial and, in the absence of any mirror clause, opens the door to imports that do not adhere to the same environmental, food and health standards as European farms.

**“ We hope the review clause scheduled for 2026 will remove agriculture from the industrial classification. ”**

# AVEC Turkey Management Best Practices 2024

Good turkey farming practices and management are essential for turkey health and welfare. Turkeys are sentient beings and deserve respectful treatment. Reflecting One Health principles, AVEC members collaborated to create a turkey management best practices guide, which was first published in 2023. This handbook demonstrates that the EU turkey meat sector is both proactive and rich in expertise, and that we wish to share our knowledge and continuously improve. The latest version of the handbook includes an updated appendix illustrating appropriate techniques for handling turkeys. It can be downloaded at <https://avec-poultry.eu/news/turkey-management-guide/>.



## Future priorities

- Monitor the EFSA scientific opinion on the welfare of turkeys on farms.
- Follow the development of HPAI vaccination in turkeys.



# Food safety and food quality

## Achievements

AVEC's food safety and food quality (FSFQ) working group brings together experts from the European Union with a focus on contaminants, consumer information and the quality of poultry meat. The group advocates for the highest standards in food safety and quality in order to maintain consumer trust. It also aims to ensure these standards are applied equally to imported products. European citizens are often not aware that food safety is integral to the sustainability of our products, and the group is also working to address this information gap.



**Julie Bret-Mayot**

Food Safety and Food Quality  
Working Group Chair

## Management of contaminants

Biological contaminants remain a key concern for AVEC and its members, particularly Salmonella and Campylobacter. In the run-up to the deadline for implementing the new Campylobacter threshold from Regulation EC 2073/2005, the AVEC FSFQ working group gathers and shares the latest research developments in collaboration with institutes like ILVO and Wageningen University. *Listeria monocytogenes* has also been a focus, with impending modifications to Regulation 2073/2005 regarding ready-to-eat products. AVEC has engaged closely with CLITRAVI, sharing member perspectives in recognition that national legislation is not aligned in this area.

With an increasing amount of regulation on chemical contaminants at the EU level, the FSFQ working group has paid particular attention to MOSH and MOAH (mineral oils) in foodstuffs. In order to anticipate contamination issues, members have tested for these contaminants, and AVEC has engaged with the Commission and other livestock associations on this topic.

## Research projects

As an official partner of the EU-funded research project BREADCRUMB, AVEC has started gathering information on potential waste generated by various marketing standards. The project is highlighting the need to reconsider the interpretation and implementation of EU rules on the classification of animal by-products.

The FSFQ working group has also closely followed several Horizon Europe research projects. By joining expert panels and advisory committees, AVEC ensures the expertise and knowledge of our sector contributes to scientific studies, fostering a safer and more sustainable food production system.

## Future priorities

### Revision of the Marketing Standards Regulation

- Monitor and follow developments on the revision of the regulation.
- Advocate for clearer guidelines, especially on farming system claims.
- Call for revised thresholds and parameters to control water content in order to avoid penalising slaughterhouses and processors who do not add water during processing.

### Origin labelling

- Monitor discussions on origin indication based on national initiatives in Italy, Germany and France.
- Promote origin labelling of fresh and processed products as EU/non-EU in all distribution circuits, including out-of-home consumption.

### Contaminants

- Evaluate the implementation of new *Campylobacter* limits starting in 2025.
- Continue monitoring biological and chemical contaminants in poultry meat.



# Sustainable production

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Over the past year, the working group on sustainable production has had to address a variety of issues, and has divided into three subgroups to maximise its effectiveness.



**Saulius Petkevicius**  
Sustainable Production  
Working Group Chair

## Subgroup on Packaging

The subgroup dealing with packaging has been collaborating with experts from UECBV and CLITRAVI who represent the red meat and meat processing sectors. The group met several times to discuss and influence the revision of the Packaging and Packaging Waste regulation. There are three main elements that will impact our sector:

- the use of recyclable packaging, with a ban of grade D and E packaging by 2030 (less than 80% recyclable)
- the requirement to reuse 40% of packaging used for transport by 2030
- a mandatory requirement of 10% recyclable plastic by 2030 (excluding PET)

For the latter, we have succeeded in having food contact materials excluded from the requirement. The group is still assessing the wider consequences of the legislation on our sector.

## Subgroup on Feed

Feed is the main source of GHG emissions associated with poultry meat production, and this subgroup is looking into potential ways of reducing its impact. To that end, we welcomed presentations assessing a number of approaches, including:

- the possibility of using former foodstuff in feed
- using insect oil as poultry feed
- using poultry feathers for the production of organic fertilisers

It is clear there is no simple solution to reducing the impact of feed on GHG emissions. The group established that the use of insect for feed is far from being a cost-efficient alternative to existing solutions in the short to medium term.

On the subject of soy, the group has worked with FEFAC to discuss the implementation of the EU Deforestation Regulation which will start to apply from January 2025. At the time of writing, there is still a lot of uncertainty about the consequences of the Regulation on the supply and price of soy.



## Subgroup on Corporate Social Responsibility

This group has been examining the consequences of the new Corporate Sustainability Reporting Directive (CSRD), which will oblige producers to report on their sustainability policy. In particular, the possibility of using a harmonised method to measure the impact of the sector (through life cycle analysis or LCA) has been extensively discussed by the group.

While many companies and countries are already working on an LCA-based approach, AVEC's board thinks it is premature to adopt such an approach at EU level. In the meantime, the group will work on harmonising the work being done on LCAs at a national level, with the aim of avoiding a system that does not support the needs of the sector being imposed to us. Looking to the future, we will continue to work on these areas in line with [the objectives of the AVEC Sustainability Charter](#).





# Trade

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## Imports from Ukraine likely to be the main priority over the coming years

AVEC and its members are committed to supporting Ukraine's citizens and society in response to Russia's aggression on their country. Reflecting this, we are ready to discuss future cooperation in the poultry meat trade between the EU and Ukraine. This will require a balanced solution that is based on a level playing field and underpinned by identical rules for producing poultry meat. The EU has now opened formal negotiations with Ukraine and Moldova on future accession to the EU. This process is expected to last several years. In the meantime – and in order to establish a bilateral trade approach to replace the EU Autonomous Trade Measures (ATM) – the EU-Ukraine Association Agreement will be renegotiated. This will take effect from 5 June 2025 when the ATM lapses. Together with other EU food and agriculture sectors, AVEC will cooperate with the EU Commission to achieve a fair outcome. This must be one that does not disturb the EU market for poultry meat, or jeopardise the further development of a sustainable EU poultry industry.



**Stig Munck Larsen**  
Trade Working Group Chair

We wish to see the swift implementation of free trade agreements, and are working to eliminate technical barriers in order to gain market access to third countries such as Mexico, Canada, Chile, as well as Asian countries.

New MEPs have now been elected to the European Parliament, marking the start of the next five year legislative term. As a result, new alliances on trade-related issues will be established. Important issues include the future trade agreement with Ukraine, and possible new EU regulations on animal welfare. In this context, we expect EU decision-makers to negotiate trade agreements with implicit reciprocity clauses for poultry production. These will ensure that the competitiveness of the EU poultry production is not undermined by third countries who do not have to comply with the same rules.

**“ AVEC continues to focus on the offensive trade interests of the EU poultry meat sector. ”**

Over the past year AVEC has secured some important trade-related achievements on behalf of the EU poultry industry. The most significant of these are:

- The EU Autonomous Trade Measures (ATM) for Ukraine introduced an import trigger level of 137,042 tons of poultry meat for 2024, and 45,000 tons for the first five months of 2025, after which import duty will apply.

- Regionalisation for poultry has become the cornerstone in new and existing free trade agreements as a way of mitigating the negative trade impact of avian influenza outbreaks. Agreement has been reached with South Korea, and a similar agreement with Japan is close to being concluded.



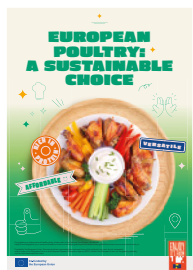
# European projects

## Promoting Sustainable Poultry



The promotional campaign ‘European poultry: good for you and the planet’ came to an end in December 2023. Co-financed by the EU, this €3.2m initiative brought together AVEC and three of its members (BVG, CIPC and AVIANZA).

On 29 November 2023, AVEC hosted a successful event ‘Sustainability in practice: spotlight on European poultry’, attracting EU professionals and key opinion-leaders in Brussels. The event focused on increasing awareness of sustainable production, animal welfare and consumer practices.



A new two-year promotion campaign initiated by four AVEC members (CIPC, KRD-IG, BVH and AVIANZA) was launched at the beginning of the new year with the slogan ‘European poultry: a sustainable choice’. The new project is called **EURSPO**, it has a budget of €4.3 million, 80% of which is funded by the European Research Executive Agency, European Commission.

EURSPO will raise awareness of the sustainability of the European poultry sector and highlight its commitment to building the most sustainable and environmentally friendly agri-food system in the European Union. There will be a particular focus on reducing food waste.



Sharing the same branding and key messages, each of the four partners is developing a national campaign to promote the sustainability of European poultry meat through a range of different approaches. These include social media channels, influencer and

TV collaborations, activities in schools and universities, poultry races and much more.

Over the two years of the programme, the target audience will be encouraged to ‘make a sustainable choice’ and select European poultry. The campaign emphasises the sector’s efforts to balance the three pillars of sustainability: environmental, social and economic.

Find out more about this initiative at [sustainablepoultry.eu](https://sustainablepoultry.eu)



## Research and innovation initiatives with Horizon Europe

# 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).

AVEC is playing an essential role in the communication, dissemination and exploitation of the activities, results and outcomes of the four-year MOZART project.

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



# BREADCRUMB

The remit 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'. It began in January 2024 and received €5m from Horizon Europe Cluster 6: Food, Bioeconomy Natural Resources, Agriculture and Environment. Under the coordination of EV-ILVO (Belgium), BREADCRUMB brings together 21 partners from seven EU countries and will last for 36 months.

BREADCRUMB aims to develop practical tools and guidelines that are tailored to food chain actors. These tools will increase the business potential of suboptimal food products and encourage them to be placed on the market in order to prevent food waste.

AVEC, together with FEBEV (Belgian beef and pork) and FENEVIAN (Belgian processed meat), is actively involved in the data collection, communication and operational activities within the meat case study.

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

# Statistics







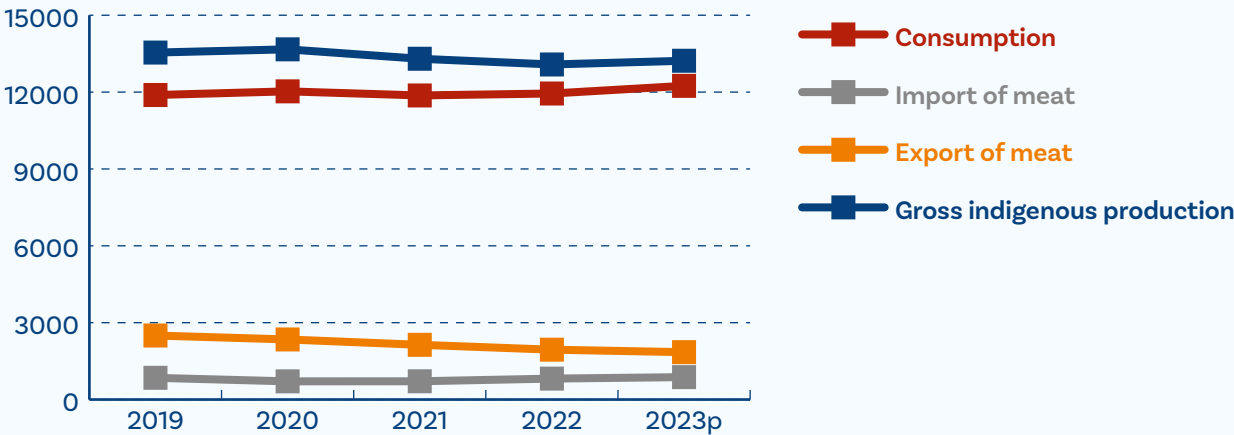
# Statistics

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

	2018	2019	2020	2021	2022	2023
	EU 28	EU 27	EU 27	EU 27	EU 27	EU 27
Gross indigenous production	15,635	13,543	13,669	13,301	13,078	13,223
Export of meat	1,665	2,499	2,345	2,136	1,946	1,849
Import of meat	850	848	710	713	817	875
Consumption	14,813	11,886	12,029	11,869	11,945	12,244
Consumption per capita, kg	25.3	23.4	23.7	23.4	23.3	23.8
Self-sufficiency, %	105.5	113.9	113.6	112.1	109.5	108.0

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

EU 27 Balance sheet for poultry meat ('000 tonnes carcass weight) 2019–2023



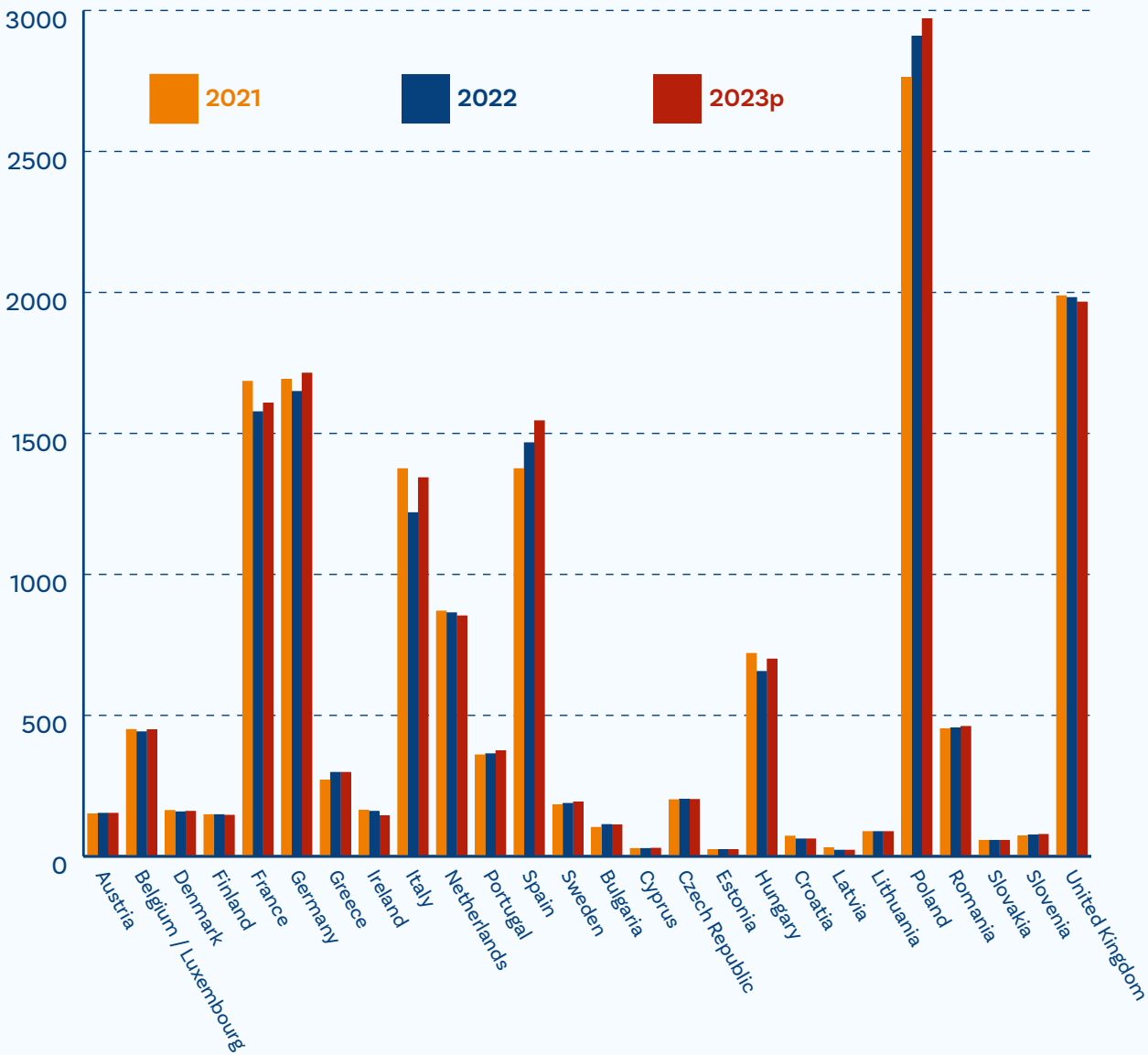
## 2. Gross domestic production of poultry meat in the EU ('000 tonnes carcass weight)

	2018	2019	2020	2021	2022	2023
Austria	132	134	144	150	152	152
Belgium / Luxembourg	470	417	448	449	441	448
Denmark	159	169	165	162	157	159
Finland	135	140	142	147	147	145
France	1,788	1,790	1,733	1,684	1,576	1,607
Germany	1,759	1,763	1,743	1,691	1,648	1,713
Greece	220	230	240	270	297	297
Ireland	146	154	166	163	159	143
Italy	1,314	1,324	1,390	1,374	1,218	1,342
Netherlands	1,038	1,036	996	869	863	852
Portugal	342	348	349	359	363	374
Spain	1,427	1,392	1,420	1,374	1,466	1,544
Sweden	155	160	172	182	187	192
Bulgaria	111	109	102	102	112	111
Cyprus	26	27	27	27	27	28
Czech Republic	193	196	200	200	202	201
Estonia	19	20	22	23	23	23
Hungary	669	688	666	719	655	699
Croatia	64	68	70	71	61	61
Latvia	33	35	35	30	21	21
Lithuania	108	100	101	87	87	87
Poland	2,597	2,863	2,981	2,762	2,908	2,970
Romania	480	507	487	452	455	460
Slovakia	75	71	58	56	56	56
Slovenia	69	70	73	72	75	77
<b>EU 27</b>	<b>13,531</b>	<b>13,814</b>	<b>13,933</b>	<b>13,479</b>	<b>13,360</b>	<b>13,764</b>
United Kingdom	1,937	1,889	1,958	1,987	1,981	1,965
<b>EU 28</b>	<b>15,468</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 (2021-2023)





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

	2018	2019	2020	2021	2022	2023
Argentina	2,068	2,306	2,316	2,295	2,278	2,500
Brazil	14,100	14,407	14,721	14,936	15,262	15,445
Chile	749	761	773	785	799	813
China	19,946	20,452	21,013	21,518	22,056	22,622
India	3,056	3,134	3,213	3,293	3,373	3,448
Japan	1,557	1,531	1,504	1,487	1,480	1,486
Mexico	3,311	3,403	3,503	3,592	3,698	3,796
Russia	4,434	4,514	4,589	4,660	4,730	4,796
Saudi Arabia	715	713	713	715	717	719
Switzerland	102	103	107	112	115	113
South Africa	1,663	1,691	1,718	1,749	1,780	1,814
Turkey	1,959	1,990	2,025	2,064	2,100	2,135
Ukraine	1,424	1,457	1,489	1,523	1,559	1,597
USA	21,884	22,397	22,931	23,402	23,766	24,123
<b>World Production</b>	<b>119,941</b>	<b>122,164</b>	<b>124,630</b>	<b>126,935</b>	<b>129,294</b>	<b>131,552</b>

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

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

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

	2018	2019	2020	2021	2022	2023	2023 from third countries - EU 27
<b>Poultry Meat<sup>1</sup></b>							
Austria	103	108	96	104	115	112	2
Belgium / Luxembourg	286	297	279	305	305	261	16
Bulgaria	110	112	100	93	94	103	1
Croatia	21	22	18	21	24	29	1
Cyprus	12	12	10	12	14	16	0
Czech Republic	115	110	113	104	124	135	1
Denmark	73	79	75	63	64	55	1
Estonia	27	22	21	22	23	25	0
Finland	9	8	8	7	9	12	0
France	457	458	437	524	557	571	37
Germany	721	721	679	695	690	666	12
Greece	82	84	72	82	85	88	1
Hungary	54	68	78	71	85	98	30
Ireland	88	77	67	65	86	85	27
Italy	69	67	68	74	123	91	2
Latvia	43	44	45	44	40	38	0
Lithuania	39	42	47	46	42	47	2
Malta	6	6	6	5	5	6	0
Netherlands	573	588	570	696	777	870	203
Poland	79	89	63	78	69	59	12
Portugal	74	73	67	67	73	85	2
Romania	137	122	134	124	117	116	6
Slovakia	83	102	77	59	86	114	17
Slovenia	20	20	18	17	20	23	1
Spain	169	151	137	138	160	182	31
Sweden	55	58	53	57	70	72	0
United Kingdom	445	434	.	.	.	.	.
<b>EU 28 from third countries</b>	<b>234</b>	<b>215</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>
<b>EU 27 from third countries</b>	<b>.</b>	<b>468</b>	<b>392</b>	<b>375</b>	<b>378</b>	<b>403</b>	<b>403</b>
<b>Salted meat<sup>2</sup></b>							
Germany	28	30	31	35	40	37	22
Netherlands	121	154	134	142	149	149	145
United Kingdom	36	45	.	.	.	.	.
<b>EU 28 from third countries</b>	<b>176</b>	<b>204</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>
<b>EU 27 from third countries</b>	<b>.</b>	<b>177</b>	<b>157</b>	<b>160</b>	<b>170</b>	<b>173</b>	<b>173</b>
<b>Preparations of poultry<sup>3</sup></b>							
<b>EU 28 from third countries</b>	<b>338</b>	<b>338</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>
<b>EU 27 from third countries</b>	<b>.</b>	<b>178</b>	<b>155</b>	<b>146</b>	<b>191</b>	<b>186</b>	<b>186</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)¹

	2018	2019	2020	2021	2022	2023	2023 from third countries - EU 27
Austria	63	65	67	72	69	169	1
Belgium / Luxembourg	572	511	517	542	479	452	106
Bulgaria	46	43	32	35	38	34	2
Croatia	9	8	8	11	11	11	7
Cyprus	1	1	1	1	1	1	0
Czech Republic	23	18	16	19	28	25	1
Denmark	83	88	81	69	84	79	22
Estonia	7	9	8	9	8	9	0
Finland	14	14	14	13	11	7	2
France	402	362	326	360	354	305	122
Germany	451	475	415	427	798	431	46
Greece	33	35	34	42	44	44	16
Hungary	213	235	204	244	219	240	52
Ireland	87	107	103	63	72	77	44
Italy	158	167	163	174	129	166	51
Latvia	17	16	15	16	16	15	3
Lithuania	51	46	47	41	38	41	21
Malta	0	0	0	0	0	0	0
Netherlands	1,495	1,583	1,455	1,320	1,353	1,291	395
Poland	1,325	1,461	1,495	1,482	1,586	1,646	553
Portugal	34	27	25	37	34	37	13
Romania	66	75	75	79	82	91	24
Slovakia	37	37	22	22	29	49	2
Slovenia	23	23	21	25	24	26	7
Spain	245	241	215	246	210	214	70
Sweden	76	84	82	81	92	80	9
United Kingdom	361	383	.	.	.	.	.
<b>EU 28 to third countries</b>	<b>1,578</b>	<b>1,686</b>	.	.	.	.	.
which were							
Chicken	1,419	1,526	.	.	.	.	.
Turkey	127	133	.	.	.	.	.
<b>EU 27 to third countries</b>	.	<b>2,167</b>	<b>2,029</b>	<b>1,809</b>	<b>1,613</b>	<b>1,579</b>	<b>1,579</b>
<b>Preparations of poultry³</b>							
<b>EU 28 to third countries</b>	<b>44</b>	<b>54</b>	.	.	.	.	.
<b>EU 27 to third countries</b>	.	<b>245</b>	<b>247</b>	<b>245</b>	<b>262</b>	<b>270</b>	<b>270</b>

**Note:** 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)

	2018	2019	2020	2021	2022	2023
<b>Total imports of poultry meat</b>						
Switzerland	45	46	43	45	48	47
Imports of broiler meat						
Angola	317	266	213	263	353	210
China	342	580	999	788	633	780
Hong Kong	.	.	.	.	.	.
Iraq	527	493	468	388	485	535
Japan	1,074	1,076	1,005	1,077	1,101	1,055
Russian Federation	225	224	200	220	.	.
Saudi Arabia	629	601	618	615	594	585
United Arab. Emirates	579	601	618	520	700	.
<b>Exports of broiler meat</b>						
Argentina	125	155	155	183	190	130
Belarus	168	174	190	184	.	.
Brazil	3,675	3,811	3,875	4,226	4,447	4,770
Chile	111	131	136	133	.	.
China	447	428	388	457	532	545
Thailand	826	881	941	907	1,021	1,105
Turkey	418	408	442	563	646	450
Ukraine	317	409	428	458	419	426
USA	3,244	3,259	3,376	3,353	3,316	3,300

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

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

	2018	2019	2020	2021	2022	2023
Austria	21.0	20.9	21.0	21.5	21.8	21.4
Czech Republic	24.0	25.0	25.5	25.3	26.0	23.5
Denmark	25.6	27.6	27.3	26.7	25.0	24.0
Finland	23.6	24.3	24.4	25.5	26.2	26.7
France	29.5	28.3	28.4	28.4	28.2	28.5
Germany	20.3	20.0	20.6	20.2	18.5	19.9
Greece	19.0	20.2	20.0	21.0	22.0	22.0
Hungary	32.5	32.9	33.0	33.5	33.0	34.0
Ireland	36.0	35.0	35.0	36.0	37.0	.
Italy	20.5	20.3	21.7	21.5	20.5	21.5
Latvia	.	23.5	25.0	24.5	.	.
Lithuania	24.5	26.0	26.0	27.0	.	.
Netherlands	22.5	22.9	22.1	22.0	21.4	.
Poland	30.0	31.4	32.7	27.8	28.4	28.0
Portugal	37.1	28.4	38.0	37.8	38.8	39.0
Slovakia	20.5	22.0	21.5	20.0	.	.
Spain	30.0	29.5	31.1	29.9	29.0	30.0
Sweden	22.2	22.4	21.8	23.1	23.1	23.3
<b>EU 28</b>	<b>24.8</b>	<b>25.3</b>	.	.	.	.
<b>EU 27</b>	.	<b>23.4</b>	<b>23.7</b>	<b>23.4</b>	<b>23.3</b>	<b>23.8</b>
Switzerland	18.4	18.4	18.4	19.2	19.4	19.0
United Kingdom	29.7	29.8	.	.	.	.

**Note:** Partial provisional or estimated.

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

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

	2018	2019	2020	2021	2022	2023
Austria	71	72	77	78	77	78
Czech Republic	67	68	67	70	68	65
Finland	98	96	98	98	98	96
France	96	89	88	87	81	80
Germany	105	106	102	101	106	102
Greece	76	80	82	82	82	82
Hungary	130	132	123	129	126	125
Ireland	89	98	102	101	103	.
Italy	107	108	107	108	100	105
Latvia	.	62	61	63	65	.
Lithuania	111	103	100	94	96	.
Netherlands	180	161	160	158	160	.
Poland	228	249	241	264	266	270
Slovakia	.	.	.	.	.	.
Spain	105	107	106	109	104	102
Sweden	115	116	.	.	.	.
<b>EU 27</b>	<b>.</b>	<b>114</b>	<b>114</b>	<b>112</b>	<b>109</b>	<b>108</b>
United Kingdom	96	97	.	.	.	.
<b>EU 28</b>	<b>106</b>	<b>106</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>

**Note:** Partial provisional or estimated.

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



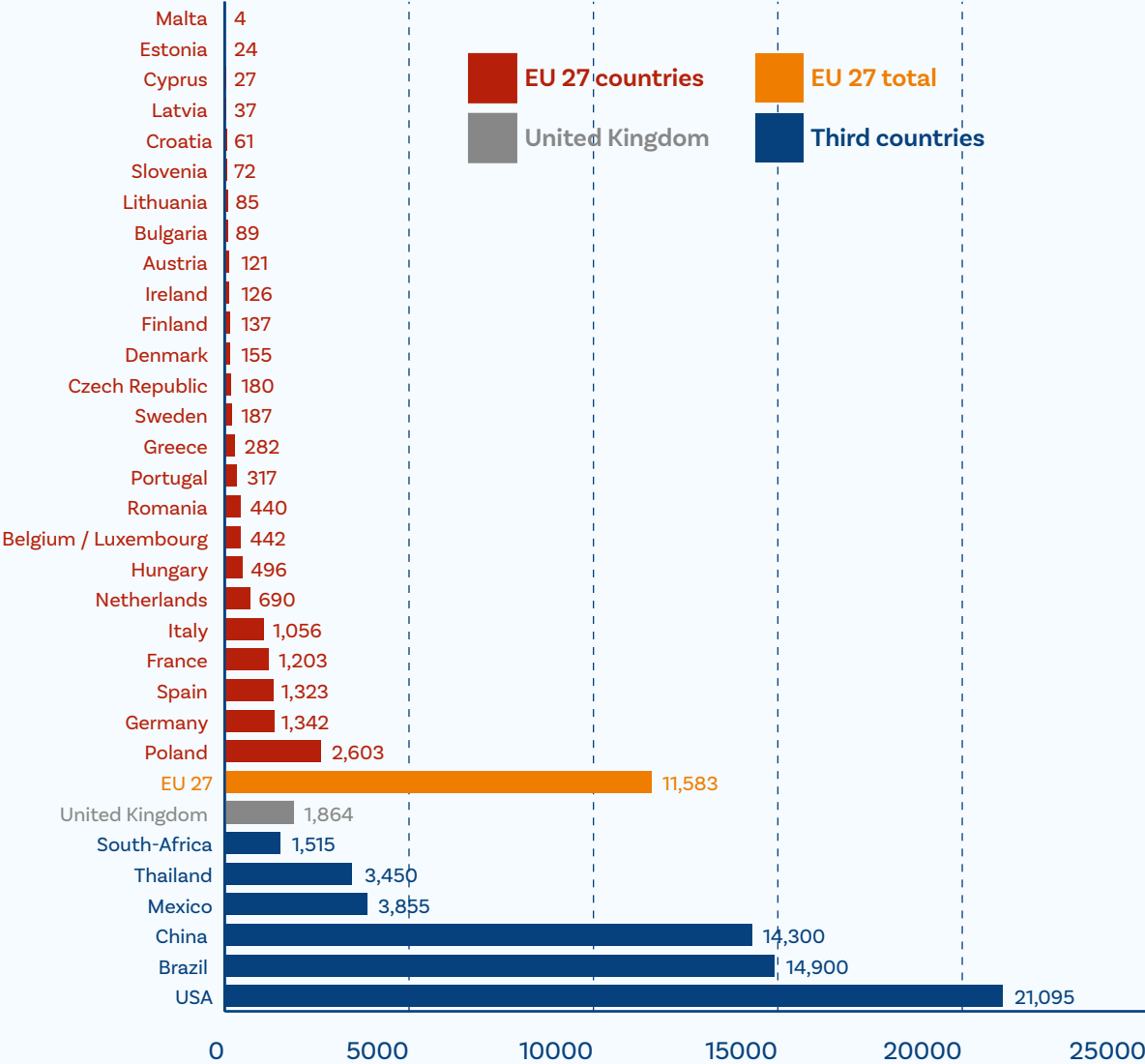
## 9. Broiler production in the EU and third countries ('000 tonnes carcass weight)

	2018	2019	2020	2021	2022	2023
Austria	114	117	118	121	121	121
Belgium / Luxembourg	462	440	441	448	435	442
Bulgaria	87	89	87	91	90	89
Cyprus	25	27	27	27	27	27
Czech Republic	170	174	177	179	180	180
Denmark	157	167	164	162	152	155
Estonia	19	20	22	23	23	24
Finland	127	132	135	139	138	137
France	1,185	1,187	1,179	1,177	1,182	1,203
Germany	1,353	1,346	1,334	1,315	1,296	1,342
Greece	185	185	185	257	282	282
Hungary	414	436	462	479	465	496
Ireland	190	205	210	200	190	126
Italy	1,001	1,015	1,100	1,067	992	1,056
Croatia	69	70	71	59	61	61
Latvia	33	35	35	35	36	37
Lithuania	103	97	97	85	84	85
Malta	4	4	4	4	4	4
Netherlands	530	562	642	692	698	690
Poland	2,115	2,207	2,243	2,287	2,540	2,603
Portugal	289	294	293	300	308	317
Romania	415	415	400	420	435	440
Slovakia	80	80	80	81	86	.
Slovenia	64	64	67	67	70	72
Spain	1,191	1,151	1,180	1,140	1,265	1,323
Sweden	150	154	167	177	182	187
<b>EU 27</b>	<b>10,532</b>	<b>10,673</b>	<b>10,920</b>	<b>11,030</b>	<b>11,341</b>	<b>11,583</b>
United Kingdom	1,750	1,726	1,779	1,841	1,840	1,864
<b>EU 28</b>	<b>12,782</b>	<b>12,892</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>
Argentina	2,068	2,203	2,219	2,294	2,319	.
Brazil	13,555	13,690	13,880	14,500	14,465	14,900
China	11,700	13,750	14,600	14,700	14,300	14,300
India	4,062	4,344	4,473	4,641	4,907	.
Indonesia	3,838	3,929	3,642	3,455	4,040	.
Iran	2,231	2,332	2,430	2,106	2,090	.
Mexico	3,485	3,600	3,596	3,665	3,763	3,855
Russia	4,543	4,606	4,577	4,617	5,308	.
South-Africa	1,407	1,395	1,537	1,570	1,577	1,515
Thailand	3,170	3,300	3,250	3,220	3,300	3,450
USA	19,361	19,941	20,255	20,391	20,992	21,095
<b>World</b>	<b>114,568</b>	<b>117,781</b>	<b>118,720</b>	<b>120,421</b>	<b>123,631</b>	<b>125,500</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 2023



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

	2018	2019	2020	2021	2022	2023
Austria	14.9	15.0	15.1	15.4	15.8	.
France	19.5	20.1	20.7	21.6	22.6	.
Germany	13.4	13.3	13.9	14.1	13.1	13.9
Italy	.	.	.	.	.	.
Netherlands	20.8	21.4	20.6	20.4	.	.
Portugal	.	.	.	.	.	.
<b>EU 28</b>	<b>20.2</b>	<b>20.8</b>	.	.	.	.
United Kingdom	.	.	.	.	.	.
<b>EU 27</b>	.	<b>20.7</b>	<b>21.1</b>	<b>21.5</b>	<b>21.9</b>	<b>22.1</b>

Third Countries						
Argentina	46.3	45.1	45.7	47.1	.	.
Brazil	46.2	46.2	47.0	48.0	45.6	46.8
China	8.1	9.7	10.4	10.3	9.9	10.0
India	3.0	3.2	2.8	.	.	.
Japan	21.9	22.2	22.0	22.9	23.2	22.9
Mexico	34.7	35.7	36.2	37.3	38.0	37.6
South Africa	32.5	31.2	32.6	31.8	31.6	30.0
USA	49.5	50.8	50.6	50.9	52.2	52.6

**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)

	2018	2019	2020	2021	2022	2023
Austria	18	16	18	20	22	20
Belgium / Luxembourg	7	8	7	7	6	7
Bulgaria	0	0	0	0	0	0
Croatia	14	15	17	17	18	18
Cyprus	0	0	0	0	0	0
Czech Republic	10	10	10	10	11	10
Denmark	1	1	1	1	5	4
Finland	8	8	6	9	9	9
France	338	339	328	305	252	246
Germany	362	375	376	348	324	344
Greece	3	3	3	3	3	3
Hungary	98	96	100	95	103	97
Ireland	27	29	31	33	33	11
Italy	301	301	313	298	219	277
Malta	0	0	0	0	0	0
Netherlands	28	.	.	.	.	.
Poland	384	408	392	368	425	417
Portugal	42	44	47	49	46	44
Romania	14	15	15	15	20	20
Slovakia	1	1	1	1	3	3
Slovenia	5	6	6	8	6	5
Spain	233	236	235	230	198	218
Sweden	5	5	5	5	5	5
<b>EU 27</b>	<b>1,899</b>	<b>1,943</b>	<b>1,939</b>	<b>1,850</b>	<b>1,731</b>	<b>1,786</b>
United Kingdom	157	175	174	125	177	.
<b>EU 28</b>	<b>2,052</b>	<b>2,103</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>
Brazil	181	172	160	157	162	.
Canada	169	165	153	150	150	.
Mexico	17	17	17	18	18	.
Russia	.	.	.	.	.	.
South Africa	596	596	596	.	.	.
USA	2,666	2,639	2,605	2,521	2,369	2,480
<b>World</b>	<b>5,665</b>	<b>5,634</b>	<b>5,618</b>	<b>5,372</b>	<b>5,081</b>	<b>5,250</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)

	2018	2019	2020	2021	2022	2023
Austria	4.7	4.4	4.5	4.6	4.7	4.7
France	4.4	4.4	4.5	4.1	3.6	.
Germany	5.4	5.3	5.4	4.8	4.2	4.6
<b>EU 28</b>	<b>4.0</b>	<b>4.1</b>	<b>.</b>	<b>.</b>	<b>.</b>	<b>.</b>
<b>EU 27</b>	<b>.</b>	<b>4.4</b>	<b>4.3</b>	<b>4.1</b>	<b>3.9</b>	<b>4.0</b>
USA	7.3	7.3	7.1	6.9	6.6	6.7

**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)

	2018	2019	2020	2021	2022	2023
Austria	0.4	0.5	0.6	0.9	1.2	1.2
Belgium / Luxembourg	0.1	0.1	0.1	0.1	0.1	0.1
Denmark	1.2	1.5	1.3	0.0	0.1	0.1
Finland	0.0	0.0	0.0	0.0	0.0	0.0
France	227.3	226.3	193.5	176.6	18.3	133.6
Germany	39.2	36.8	29.1	24.6	24.2	23.1
Greece	0.1	0.1	0.1	0.0	0.0	0.0
Ireland	5.8	4.5	5.0	5.5	5.5	6.0
Italy	6.0	4.0	4.0	4.0	3.0	4.0
Netherlands	19.0	.	.	.	.	.
Portugal	10.6	10.6	9.7	9.7	8.9	12.0
Spain	3.2	4.6	4.5	4.3	3.3	3.5
Sweden	0.0	0.0	0.0	0.0	0.0	0.0
Bulgaria	23.1	19.8	19.8	19.9	22.4	22.4
Cyprus	0.0	0.0	0.0	0.0	0.0	0.0
Czech Republic	12.2	11.0	12.0	10.3	11.0	10.5
Estonia	.	.	.	.	.	.
Hungary	122.9	118.4	82.5	117.8	70.4	84.8
Latvia	.	.	.	.	.	.
Lithuania	0.1	0.0	0.0	0.0	0.0	0.0
Malta	.	.	.	.	.	.
Poland	45.0	52.2	70.1	57.9	64.6	68.9
Romania	.	.	.	.	.	.
Slovakia	0.4	0.6	0.6	0.6	0.6	0.6
Slovenia	.	.	.	.	.	.
<b>EU 27</b>	<b>555.0</b>	<b>550.0</b>	<b>500.0</b>	<b>495.0</b>	<b>395.0</b>	<b>430.0</b>
United Kingdom	30.4	28.3	22.7	21.3	17.7	.
<b>EU 28</b>	<b>585.4</b>	<b>577.9</b>	.	.	.	.
<b>World</b>	<b>4,650.7</b>	<b>6,011.4</b>	<b>6156.1</b>	<b>6209.1</b>	<b>6068.8</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.

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

	2024	2025	2026	2027	2028	2029	2030	2031
Gross Indigenous Production	13659	13677	13692	13707	13724	13744	13761	13781
Imports (meat)	910	891	892	894	897	899	901	902
Exports (meat)	1926	1981	2009	2026	2043	2054	2085	2101
Net trade (meat)	1016	1090	1117	1131	1146	1155	1185	1199
Domestic use	12634	12576	12581	12580	12580	12580	12582	12582
per capita consumption (kg r.w.e.)*	24.6	24.5	24.6	24.6	24.6	24.7	24.7	24.7
EU market price in EUR/t	2256	2170	2160	2184	2213	2238	2255	2276
World market price in EUR/t	1589	1586	1580	1597	1618	1638	1657	1675
World market price in USD/t	1732	1728	1741	1767	1793	1818	1840	1863

			Difference(a)		Annual growth (%) (b)	
	2032	2033	2023-2013	2035-2023	2013-2023	2023-2035
Gross Indigenous Production	13802	13824	2253.1	597.9	1.9%	0.4%
Imports (meat)	903	904	-113.3	106.5	-1.3%	1.0%
Exports (meat)	2123	2146	167.1	210.2	0.9%	0.8%
Net trade (meat)	1219	1242	280.5	103.7	2.7%	0.7%
Domestic use	12583	12584	1972.6	497.9	1.8%	0.3%
per capita consumption (kg r.w.e.)*	24.8	24.8	3.5	1.2	1.6%	0.4%
EU market price in EUR/t	2299	2319	356.4	-37.7	1.6%	-0.1%
World market price in EUR/t	1696	1715	188.4	111.2	1.2%	0.5%
World market price in USD/t	1888	1911	-133.8	148.4	-0.7%	0.7%

\* 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



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

	2024	2025	2026	2027	2028	2029	2030	2031
Gross Indigenous Production	42219	42216	42102	41998	41886	41775	41658	41545
Imports of live animals	4	6	6	6	6	6	6	6
Exports of live animals	330	316	308	299	291	282	274	266
Net Production	41893	41905	41800	41704	41600	41498	41389	41284
Imports (meat)	1517	1518	1518	1521	1525	1530	1534	1538
Exports (meat)	5823	5950	5991	6038	6044	6044	6054	6077
Net trade (meat)	4306	4432	4473	4517	4519	4514	4520	4538
Domestic use	37568	37452	37336	37197	37087	36975	36875	36745
per capita consumption (kg r.w.e.)*	66.6	66.6	66.5	66.3	66.2	66.1	66.0	65.9
of which Beef and Veal meat	9.9	9.9	9.9	9.8	9.8	9.7	9.7	9.7
of which Sheep and Goat meat	1.4	1.3	1.3	1.3	1.3	1.3	1.3	1.3
of which Pig meat	30.8	30.8	30.7	30.6	30.5	30.4	30.3	30.2
of which Poultry meat	24.6	24.5	24.6	24.6	24.6	24.7	24.7	24.7

			Difference (a)		Annual growth (%) (b)	
	2032	2033	2023-2013	2035-2023	2013-2023	2023-2035
Gross Indigenous Production	41433	41321	2395.6	-2011.5	0.6%	-0.4%
Imports of live animals	6	6	1.7	0.5	4.2%	0.8%
Exports of live animals	258	251	82.1	-75.8	3.1%	-2.3%
Net Production	41180	41075	2315.2	-1935.2	0.6%	-0.4%
Imports (meat)	1541	1546	-207.6	168.5	-1.4%	1.0%
Exports (meat)	6090	6122	1,116.9	-390.3	1.9%	-0.5%
Net trade (meat)	4549	4577	1,324.5	-558.7	3.0%	-0.9%
Domestic use	36632	36500	1052.2	-1394.5	0.3%	-0.3%
per capita consumption (kg r.w.e.)*	65.8	65.7	1.2	-1.6	0.2%	-0.2%
of which Beef and Veal meat	9.6	9.6	-0.4	-0.7	-0.3%	-0.6%
of which Sheep and Goat meat	1.3	1.3	-0.2	0.0	-1.1%	0.0%
of which Pig meat	30.1	29.9	-1.8	-2.1	-0.6%	-0.6%
of which Poultry meat	24.8	24.8	3.5	1.2	1.6%	0.4%

\* 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

## 15. EU27 poultry meat imports by product type, 2023, 2022, 2020, 2015

Product definition	Quantity (tonnes)				Value	
	2023	2022	2020	2015	2023	2022
Total Product Groups	894,768	854,651	804,772	961,508	2.35	2.49
Poultry salted meat in brine	250,193	246,440	227,658	315,547	1.72	1.93
Frozen chicken meat	221,261	202,775	176,358	220,626	1.89	2.05
Fresh chicken meat	207,417	190,322	159,784	121,590	1.20	1.04
Poultry preparations	140,754	141,921	114,052	203,286	5.67	5.85
Poultry fats	33,815	33,413	13,953	7,649	0.84	1.12
Chicken offals	19,771	21,847	75,169	46,655	0.63	0.52
Frozen turkey meat	15,183	9,992	21,531	22,496	3.00	2.72
Fresh turkey meat	2,957	4,129	7,414	16,580	1.81	1.50
Turkey offals	384	328	1,643	1,108	1.04	0.89
Duck & goose offals	65	148	313	767	1.91	2.99
Frozen duck & goose meat	100	93	2,240	1,951	3.77	3.40
Fatty duck & goose liver	5	2	35	10	40.29	31.20

**Source:** Eurostat (Comext) – <https://agridata.ec.europa.eu/extensions/DashboardPoultry/PoultryTrade.html>, June 2024

## 16. EU27 poultry meat exports by product type 2023, 2022, 2020, 2015

Product definition	Quantity (tonnes)				Value	
	2023	2022	2020	2015	2023	2022
Total Product Groups	1,958,948	2,030,235	2,520,753	2,145,933	2.42	2.33
Frozen chicken meat	1,007,787	1,096,989	1,504,550	1,264,155	1.21	1.23
Fresh chicken meat	480,068	481,595	446,936	348,600	2.88	2.98
Poultry preparations	182,620	181,052	171,649	145,627	6.64	6.33
Chicken offals	99,370	87,091	136,155	84,090	0.91	0.83
Frozen turkey meat	94,743	93,076	134,003	130,798	1.92	1.82
Fresh turkey meat	33,874	32,257	30,452	39,993	3.95	4.16
Frozen duck & goose meat	21,464	19,465	23,391	32,614	4.12	4.25
Poultry fats	13,171	13,866	17,511	21,911	1.94	2.18
Turkey offals	6,159	7,155	6,776	19,785	1.23	1.18
Poultry salted meat in brine	4,747	4,259	30,665	29,789	1.87	1.87
Duck & goose offals	2,331	1,182	3,925	4,481	3.15	3.04
Other poultry fresh or frozen meat	1,762	1,572	1,783	2,270	4.73	4.27
Fresh duck & goose meat	2,542	2,941	3,019	6,421	7.50	6.38
Fatty duck & goose liver	1,511	899	1,655	2,509	39.41	38.23
Other poultry offals	51	98	150	122	8.87	4.29

Source: Eurostat (Comext) - <https://agridata.ec.europa.eu/extensions/DashboardPoultry/PoultryTrade.html>, June 2024







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