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Report Highlights:

Following declining production in 2021 due to COVID-19 and outbreaks of Highly Pathogenic Avian Influenza (HPAI), EU chicken meat production is expected to resume growth in 2022 and 2023. The EU chicken meat trade surplus will decrease as imports are growing and exports will continue to decline. As consumption in hotels, restaurants and institutional (HRI) outlets resumes, demand for inexpensive chicken meat, especially from Brazil and Thailand, is rising. EU chicken meat imports now also benefit from the EU decision to temporarily suspend import quotas and tariffs on Ukrainian products. The decrease in EU chicken meat exports is mainly due to HPAI-related bans in some EU customer countries and the growing competition with other poultry exporters including Brazil, Ukraine, the United States and Russia. Within the EU, increasing food inflation and higher energy costs will continue to favor chicken meat consumption as other animal proteins remain relatively more expensive.

DISCLAIMER

The figures in the PSDs in this report are not official USDA numbers, but they result from a collaborative effort by FAS EU offices to consolidate PSDs from all 27 EU Member States.

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Executive Summary

After declines in 2021 due to COVID-19 and outbreaks of Highly Pathogenic Avian Influenza (HPAI), **EU chicken meat production is expected to resume growth in 2022 and 2023.** Poland, still the largest EU chicken producer, accounting for almost 20 percent of all EU chicken production, was significantly affected by the COVID-19 lockdowns in 2021. Prior to the COVID-19 outbreaks, almost 50 percent of Polish chicken meat production was exported primarily for the hotels, restaurants and institutional cafeterias (HRI) sector. With the easing COVID-19 restrictions, Polish chicken meat production is expected to resume growth in 2022 but will continue to face significant challenges with higher feed and energy costs in 2023. The chicken industry operates on a short two- to three-month production cycle which is very reactive to outside events. USDA forecasts are based on assumptions and information that are current at the time of publication.

EU chicken meat trade surplus is expected to decrease in 2022 and 2023 as imports increase and exports remain stagnant.

As consumption in the HRI sector resumes, demand for inexpensive imported chicken meat parts especially from Brazil, Thailand, and Ukraine is increasing. Poultry imports from the UK continue to face constraints from EU import requirements following Brexit and the establishment of new veterinary requirements and inspection procedures for UK chicken meat.

Chicken meat imports from Ukraine now benefit from the EU's May 2022 decision to temporarily suspend import quotas and tariffs on Ukrainian chicken meat. Unless it is extended, the EU suspension will expire on June 5, 2023. The decrease in EU exports is mainly due to HPAI-related bans in some EU customer countries and the increased price competitiveness of other exporters including Brazil, Ukraine, the United States and Russia.

The decline in EU exports in 2021 and 2022 was mainly due to COVID-19 lockdowns which reduced demand in most EU export markets (in 2021) and the bans on Dutch, German, and Polish chicken meat in several key markets due to HPAI outbreaks (in 2021 and 2022). On the other hand, EU chicken meat exports to UK are expected to grow by 20 percent in 2022. In 2023, EU chicken meat exports are unlikely to grow as HPAI outbreaks continue to constrain market access and competition with inexpensive Brazilian chicken will be strong especially in Asia and in sub-Saharan Africa.

Chicken meat is the preferred animal protein compared to more expensive beef and pork products. In the context of food inflation and higher energy costs, EU chicken meat consumption will remain strong in 2022 and 2023. EU consumption data show a close relationship with demographic growth, which means that per capita consumption is slowly increasing. While special production schemes including organic, free range, and GMO-free chicken are widely supported throughout the EU, sales of inexpensive chicken meat cuts continue to grow faster than sales of more expensive products like breasts and whole birds.

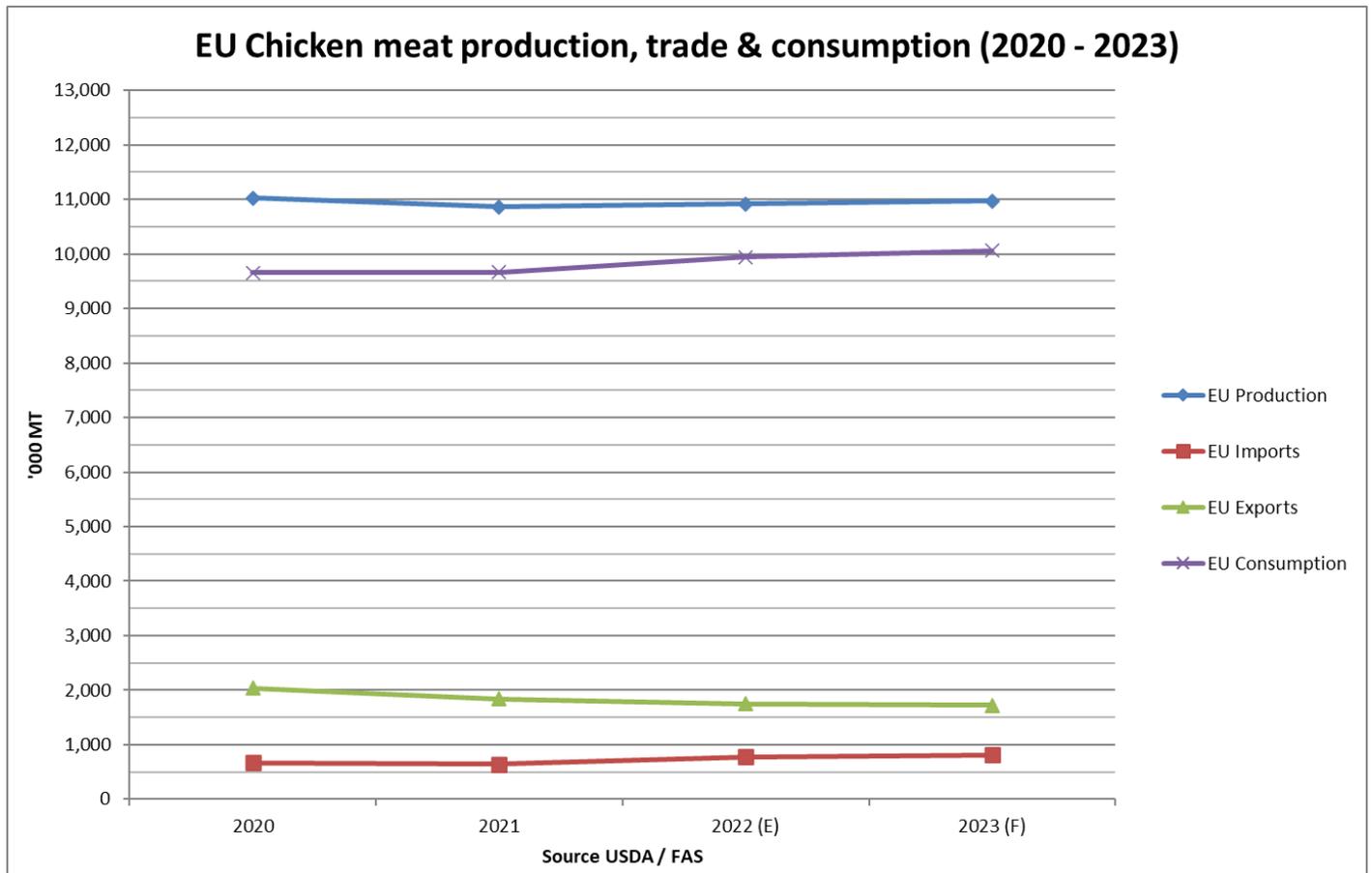
Production, Supply and Distribution:

Chicken Meat PS&D Table

Meat, Chicken	2021		2022		2023	
	Jan 2021		Jan 2022		Jan 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	10,860	10,860	10,920	10,920	10,970	10,970
Total Imports (1000 MT)	645	645	775	775	815	815
Total Supply (1000 MT)	11,505	11,505	11,695	11,695	11,785	11,785
Total Exports (1000 MT)	1,838	1,838	1,750	1,750	1,720	1,720
Human Consumption (1000 MT)	9,667	9,667	9,945	9,945	10,065	10,065
Other Use, Losses (1000 MT)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT)	9,667	9,667	9,945	9,945	10,065	10,065
Total Use (1000 MT)	11,505	11,505	11,695	11,695	11,785	11,785
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000)	11,505	11,505	11,695	11,695	11,785	11,785

MT)						
(1000 MT)						

Figure 1



Production

EU production for 2021 has been revised upward to account for final production data from Germany, Ireland, Hungary and Romania. EU chicken meat production is expected to increase by 1 percent in 2022 driven by higher production in Poland, France, Germany and the Netherlands while production in other EU Member States will likely remain flat. This increase is driven by strong consumer demand following the easing of COVID-19 lockdowns.

The post-COVID-19 economic situation throughout Europe has worsened due to the energy crisis caused by the war in Ukraine. Conditions favor less expensive protein sources, and this will lead to

growing demand for chicken meat in 2022 and 2023. While higher energy and feed costs are placing upward pressure on chicken meat prices, the market will continue to favor chicken as the preferred source of animal protein.

An estimated 98 percent of all EU chicken production consists of broiler meat. The remaining 2 percent is primarily meat derived from laying hens and cocks.

As of June 2022, according to data from the European Food Safety Authority (EFSA), there have been 2,398 outbreaks of HPAI in 36 European countries leading to the culling of 46 million birds. The impacts were most severe in the duck, turkey and laying hens sectors.

List of countries temporarily banning EU poultry and egg products from HPAI affected Member States	List of countries restricting EU poultry products based on EU regionalization protocols
South Africa	Ukraine
China	Belarus
South Korea	Hong Kong
Singapore	Kazakhstan
Japan	Russia
Taiwan	Armenia
United Arab Emirates	Cuba
Philippines	Saudi Arabia

The expansion of free-range chicken production in several EU Member States, driven by consumers’ demand for free range and/or organic chicken meat, is a growing concern for EU veterinary authorities as these production methods are believed to be more vulnerable to HPAI epidemics, as birds roaming outside are more likely to be in contact with wild birds including migratory birds that carry the HPAI virus.

Poland, still the largest chicken producer in the EU, accounting for almost 20 percent of all EU chicken production, was especially hit by the declining demand in the HRI sector. Prior to COVID-19, nearly 50 percent of the Polish chicken meat production was exported, and most of exports to EU Member States were destined for the HRI sector. With the easing of COVID-19 restrictions, FAS Warsaw estimates that Polish chicken production will grow by 2.5 percent in 2022. In 2023, higher feed and energy prices

could create a challenging situation for the Polish chicken meat industry. If prices rise too quickly, the Polish chicken sector could face the pressure of overproduction.

The Dutch chicken sector has faced significant challenges on three fronts: COVID-19, HPAI and Brexit. While Dutch poultry producers enjoy relatively stable profit margins in the domestic retail sector, farms and slaughterhouses that depend more on export markets and the HRI sector, have experienced more difficulties in the marketplace. Several Dutch poultry processors, who operate more in the international spot market, have declared bankruptcy and/or have been absorbed by competitors. While the situation is stabilizing as consumer demand in the EU is increasing, Dutch chicken meat production is still below 2013 levels.

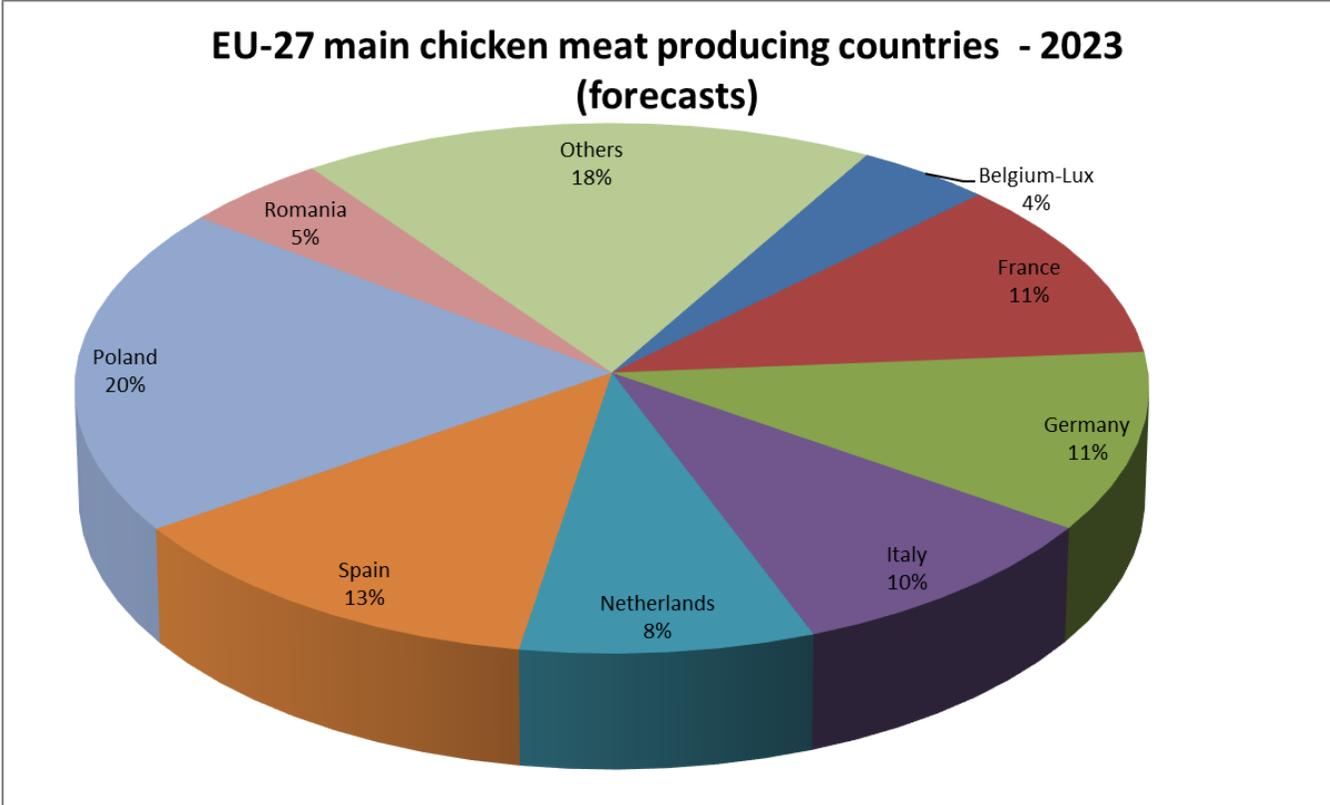
The Dutch retail market is almost exclusively dedicated to fresh chicken products under the scheme “Better Life”. This animal welfare label was first introduced in 2007. The “Better Life” scheme is owned by the Dutch Society for the Protection of Animals (SPA). The SPA cooperates with producers and retailers. The SPA has also tried to include non-GE feed in its requirements, but this has not been welcomed by the Dutch poultry sector. Currently, the “Better Life” label is one of the most successful sustainability labels, ten times larger than the organic label for the meat sector. It has quickly become the standard for chicken meat in supermarkets. This production system implies lower density of birds on farms and is a limiting factor for increasing production. On June 10, 2022, the Dutch government presented plans to reduce nitrogen emissions. The dairy and swine sector will likely be most directly affected by these plans. Dutch poultry farmers are relatively profitable and are therefore less inclined to reduce operations to participate in this scheme.

In France, chicken meat production is increasing slowly driven by domestic demand, even though exports have been declining. The French domestic retail market for chicken meat remains strong, as French households generally prefer to purchase domestically produced chicken.

Spanish chicken meat production is expected to slightly increase in 2022 and 2023. In the coming years, the Spanish chicken meat sector plans to modernize to improve animal welfare, sustainability practices and to develop more export markets. This will be part of a \$4.2 billion effort (funded through the EU Next Generation funds) to improve the Spanish animal sector.

Romania is also expected to increase production in 2022, encouraged by strong consumer demand and the price competitiveness of chicken meat compared to pork. Bulgaria’s poultry sector continues to consolidate and modernize; medium- and large-sized farms account for 98 percent of total chicken inventory. Backyard production now accounts for less than 2 percent of total chicken production.

Figure 2

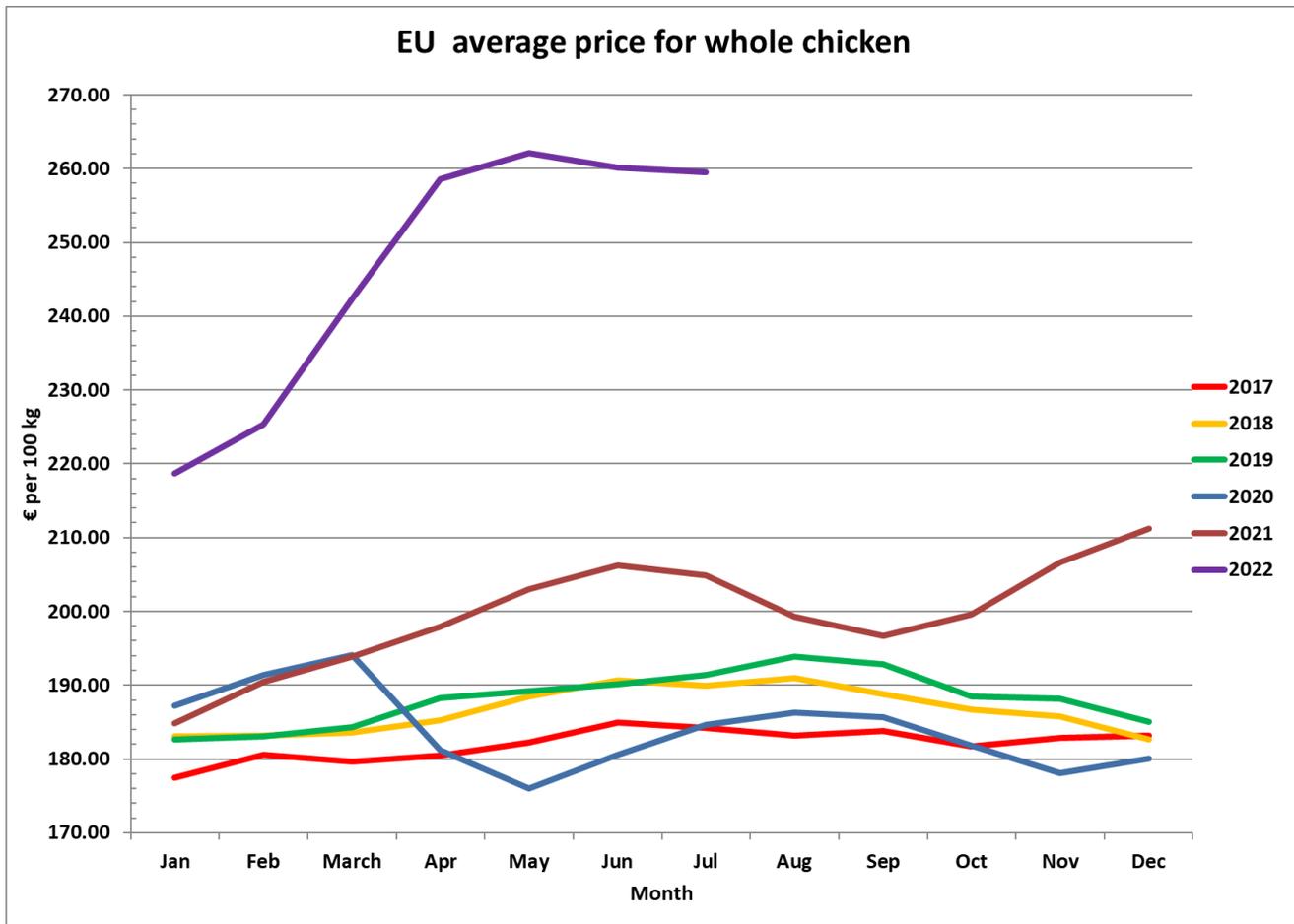


(Source FAS Posts)

Price

EU Chicken prices increased significantly in the last semester of 2021 and the first quarter of 2022 fueled by strong domestic demand not matched by increasing production and imports combined with higher grain and energy costs. Prices stabilized during the second quarter as both production and imports increased. For the foreseeable future, prices are expected to remain well above the historical average.

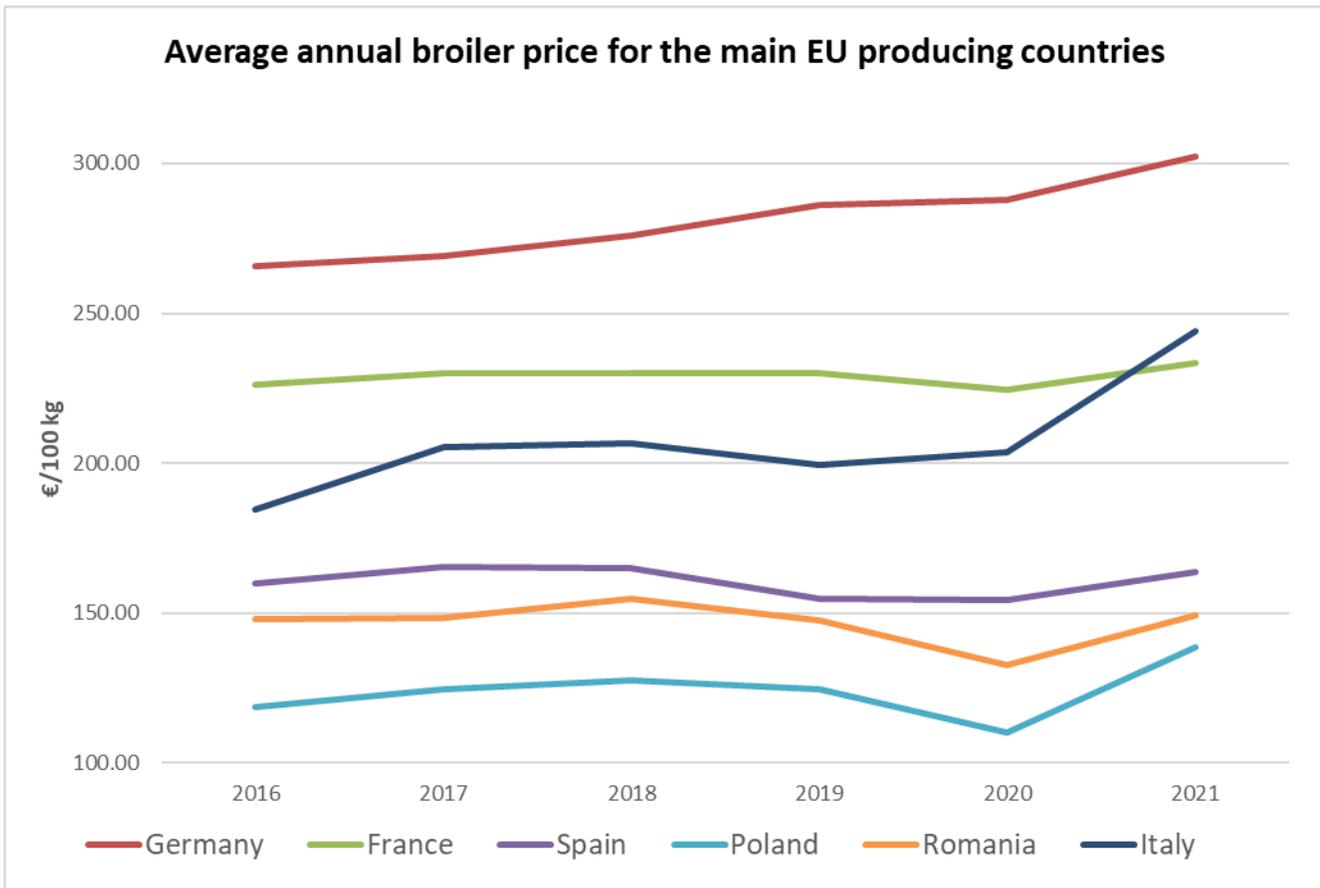
Figure 3



(Source: European Commission, data for broilers only)

Within the EU there are significant price differences among the Member States. This is particularly true for broiler meat. On average, chicken prices in Germany are 1.5 € per kilo (\$0.68 per lb.) higher than in Poland. The average price differential with France is 0.7 € per kilo (\$0.32 per lb.). This explains why Polish chicken meat shipments to other EU Member States have increased significantly in recent years, even to the point of displacing inexpensive imported Brazilian chicken meat.

Figure 4



(Source: European Commission, data for broilers only)

Trade

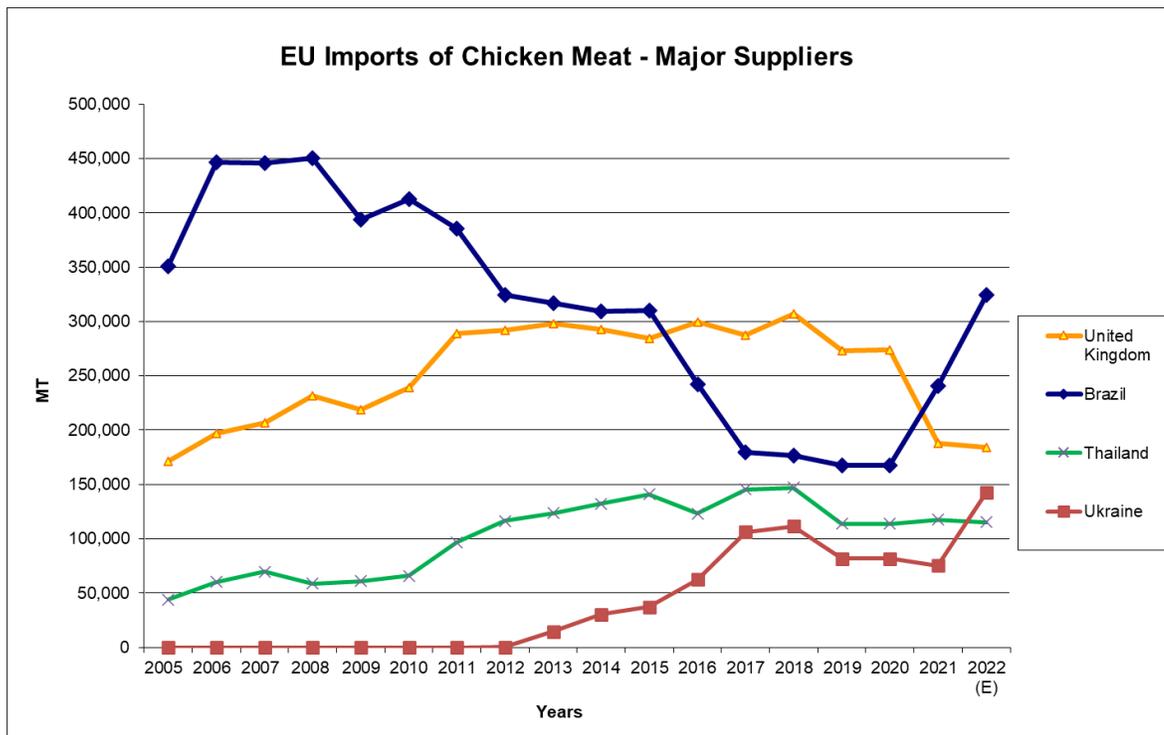
The EU chicken meat trade surplus is expected to decrease in 2022 as EU imports increase and exports decline. The easing of COVID-19 restrictions and the re-opening of the HRI sector have boosted demand for imports, while HPAI outbreaks continue to constrain export opportunities.

Assuming stable demand from the HRI sector, import demand in 2023 will remain strong.

EU Imports

EU imports of chicken meat are regulated by [regulation \(EU\) 2020/760](#) that sets [tariff rate quotas](#) (TRQ) for specific HS code category. Products imported above the existing quotas are subject to the [EU ad valorem tariff](#). For more information about applicable tariffs: check <https://trade.ec.europa.eu/access-to-markets/en/home>

Figure 5



(Source Trade Data Monitor)

In CY 2022, Brazil is expected to regain its status as the largest supplier of chicken meat to the EU, followed by UK, Ukraine and Thailand. Since Brexit, the UK is considered a third country extra-EU partner, and therefore EU trade restrictions apply; this includes [prohibiting](#) imports of chilled and frozen minced poultry meat. Imports of chicken meat from UK declined sharply starting in 2021 as UK exporters faced border controls and inspections following the end of the Brexit transition period on January 1, 2021.

In July 2020, the General Court of the European Union dismissed a case brought by two Brazilian meat companies (BRF SA and SHB Comércio e Indústria de Alimentos SA) about the 2018 EU's decision to delist their plants. The Court ruled that the EU Commission had acted lawfully in delisting facilities that had a record of salmonella contamination. Additionally, cases of fraud were also detected in March 2018 during a laboratory certification of meat products exported to the EU. The Court found that the fraud concerning lab certification for poultry meat and meat products exported to the EU called into question the reliability of Brazilian authorities to protect public health. BRF and SHB were also ordered to pay the litigation costs to the Commission.

On November 8, 2021, Brazil **Error! Hyperlink reference not valid.** with the European Union with respect to measures on importation of certain poultry meat preparations from Brazil, in particular salted poultry meat and turkey meat with pepper. The request concerned the application by the European Union of Salmonella food safety criteria on fresh poultry meat and certain poultry meat preparations, and the appropriate level of sanitary protection necessary to address risks to human health from the contamination of Salmonella in products under these food categories. Brazil has noted there is no technical or scientific evidence to justify the application of stricter microbiological criteria for the detection of salmonella in salted chicken meat and turkey with pepper, in comparison to fresh poultry meat. Brazil's position is that by imposing discriminatory criteria, the European Union is in violation of the rules of the Agreement on Sanitary and Phytosanitary Measures of the WTO and creates unjustified barriers to international trade.

The MERCOSUR-EU Free Trade Agreement announced in the summer of 2019 could eventually facilitate Brazil exports of poultry meat to the EU but its ratification is very uncertain. Several Member States are voicing concerns. France, for example, is against the agreement, and recently Germany has also added on its own concerns.

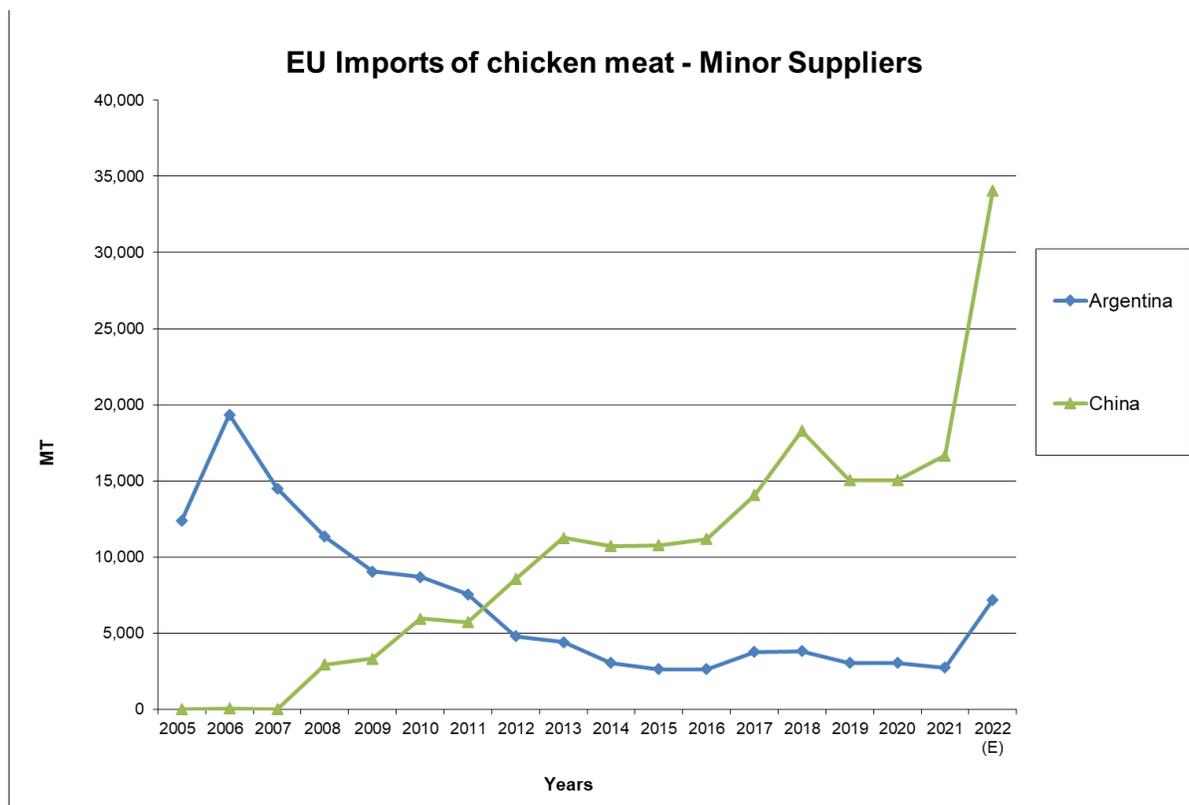
Ukraine is currently the third largest supplier of chicken meat to the EU because of the Deep and Comprehensive Free Trade Agreement (DCFTA) signed in 2014 between Ukraine and the EU. The agreement sets up Tariff Rate Quotas (TRQs) for chicken parts and whole birds for imports by both parties. The initial agreement has been revised in July 2019 as, in the original TRQ, bone-in cuts (HS code 02071310) imports from Ukraine were not subject to EU import quotas or tariffs. Such cuts require further processing in the EU to make the boneless chicken meat product that is sought by EU food processors. Dutch and German chicken meat processors used these products as raw material for added value-product like sausages and deli products.

Using this loophole, the major Ukrainian producer (MHP) exported chicken breast cuts with a little bone attached. MHP acquired poultry processing facilities in the Netherlands and in 2017 in Slovakia. In these facilities, the bone is removed from these chicken cuts. The proximity of the Slovakian facility to the Ukrainian Border meant that those products could be trucked chilled, not frozen, from the Ukrainian slaughterhouses in a matter of hours. The final product (boneless breast) could then be sold as EU processed products from the Netherlands or Slovakia, essentially bypassing the need to declare the Ukrainian origin to the final consumer. This situation explains why until 2019 Ukraine exported much

more chicken meat to the EU than what is authorized by the DCFTA. To maintain access to EU markets, Ukraine’s largest poultry producer, MHP SE, acquired one of the largest Southeast European poultry producers, [Perutnina Ptuj](#), in Slovenia for \$273 million in spring 2019. The new import TRQ set in 2019 led to an overall decrease of Ukraine’s chicken meat exports to the EU.

The Russian invasion of Ukraine in February 2022 has ushered significant changes. On May 30, 2022, the EU enacted [EU regulation 2022/870](#) to support the Ukrainian economy. This EU Regulation establishes temporary free-trade measures to supplement the trade concessions under the DCTA. Ukrainian chicken meat is now eligible to enter the EU without tariffs or quotas. This measure is temporary and, unless it is extended, it will expire on June 5, 2023. With this measure in place, EU chicken meat imports from Ukraine have doubled from May to June 2022. Thus, Ukraine chicken meat exports to the EU are expected to reach 120,000 MT to 140,000 MT in 2022, almost doubling from 2021.

Figure 6



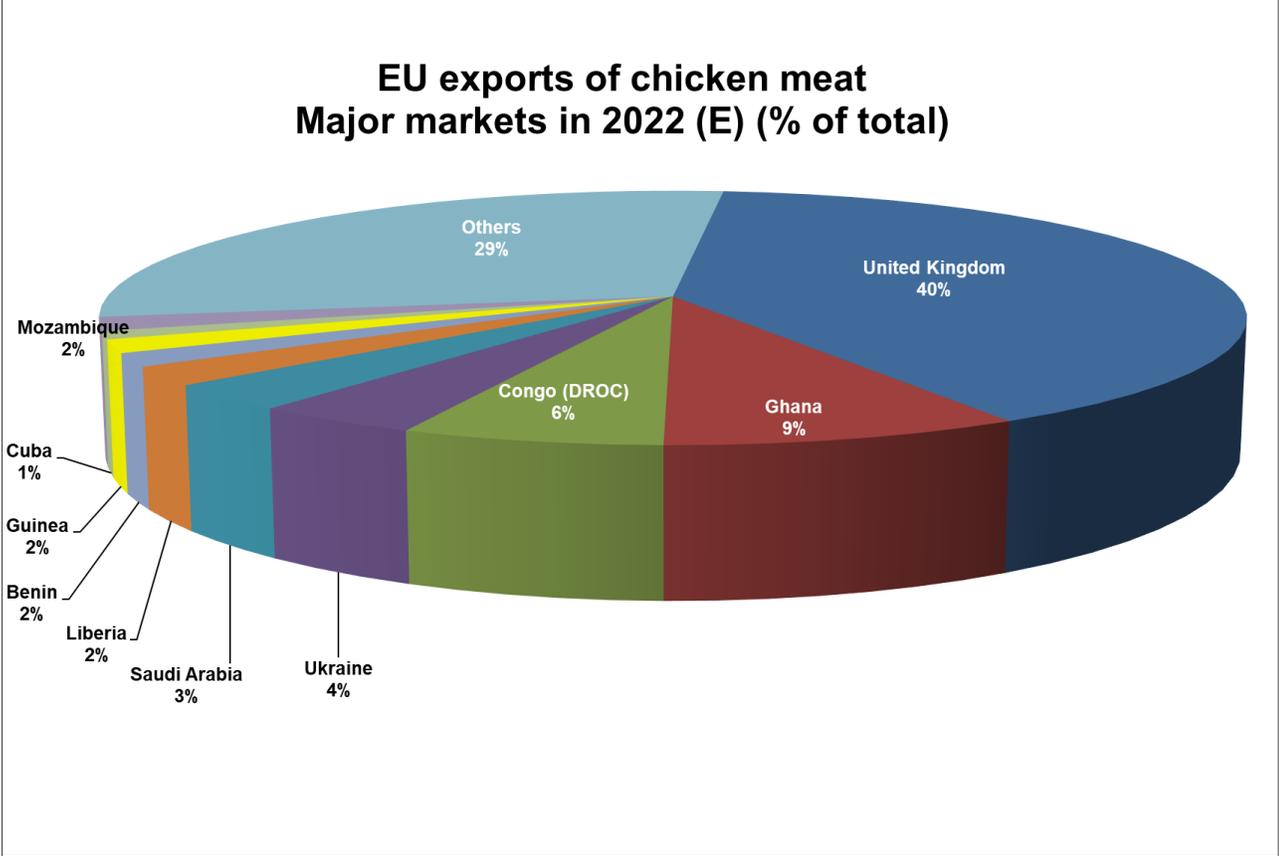
(Source Trade Data Monitor)

Argentinian chicken meat exports have significantly decreased due to the competition from Brazil. On the other hand, Chinese chicken meat exports to the EU rose significantly, especially in 2022. Chinese chicken companies located in Shandong province were able to use larger tariffs rate quotas opened in 2019 by the EU to Chinese heat-treated chicken meat.

The United States, which in 2005 exported as much as 92,000 MT of chicken meat to Romania and Bulgaria, is no longer a supplier to the EU. This is because the EU does not accept Pathogen Reduction Treatments (PRTs) that are commonly used by United States poultry processors.

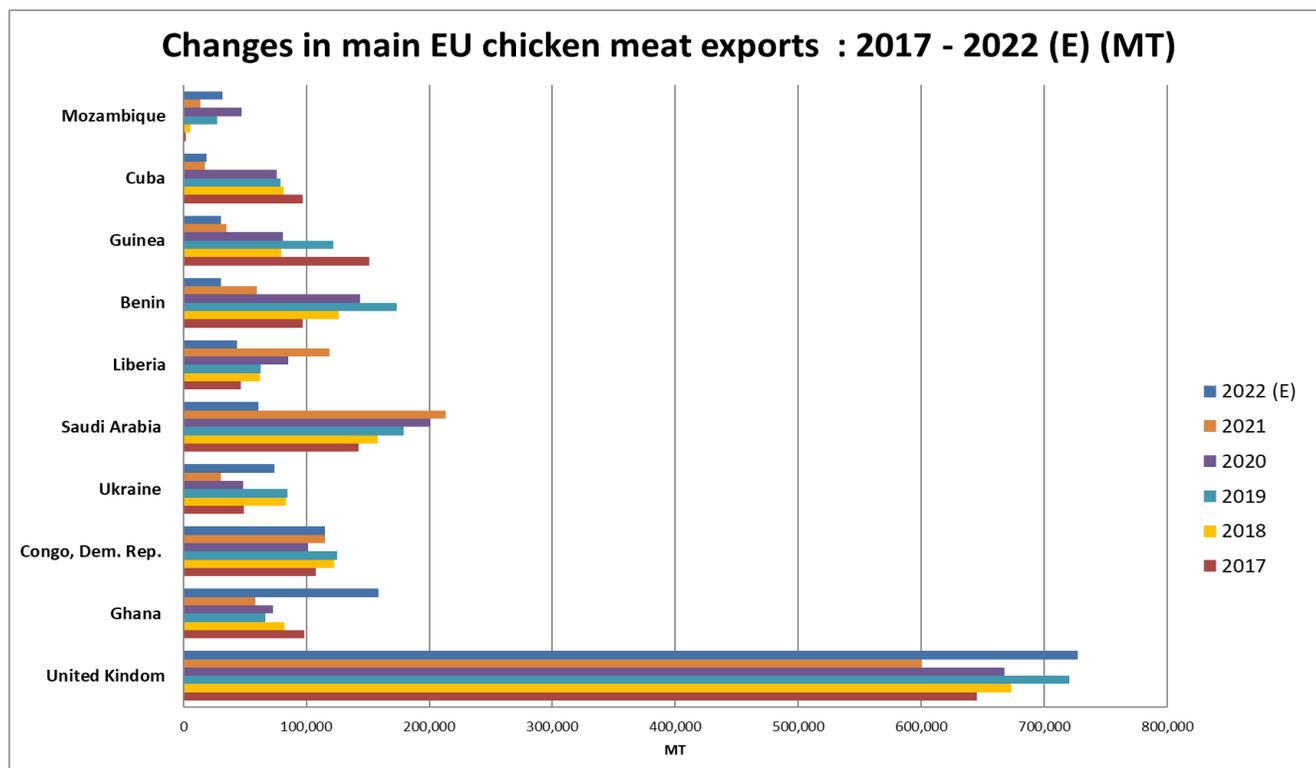
EU Exports

Figure 8



(Source FAS Posts estimates from 8 months of Trade Data Monitor data in CY 2022)

Figure 9



(Source Trade Data Monitor, FAS Posts estimates)

After a 0.7 percent decline in 2021, EU-27 chicken meat exports are expected to again decrease by 4.8 percent in 2022 mainly due to HPAI-linked import ban in several EU chicken meat customers such as Vietnam, South Africa, and Philippines. In the Philippines, the EU is forecasted to export less than 10,000 MT of chicken meat in 2022, 10 percent of what it used to export 5 years ago.

The UK is now the single largest client for EU chicken meat, accounting for 28 percent of EU exports. Sub-Saharan countries led by Ghana, Democratic Republic of Congo, Liberia, Benin, and Guinea are major outlets for low-priced, frozen chicken meat cuts.

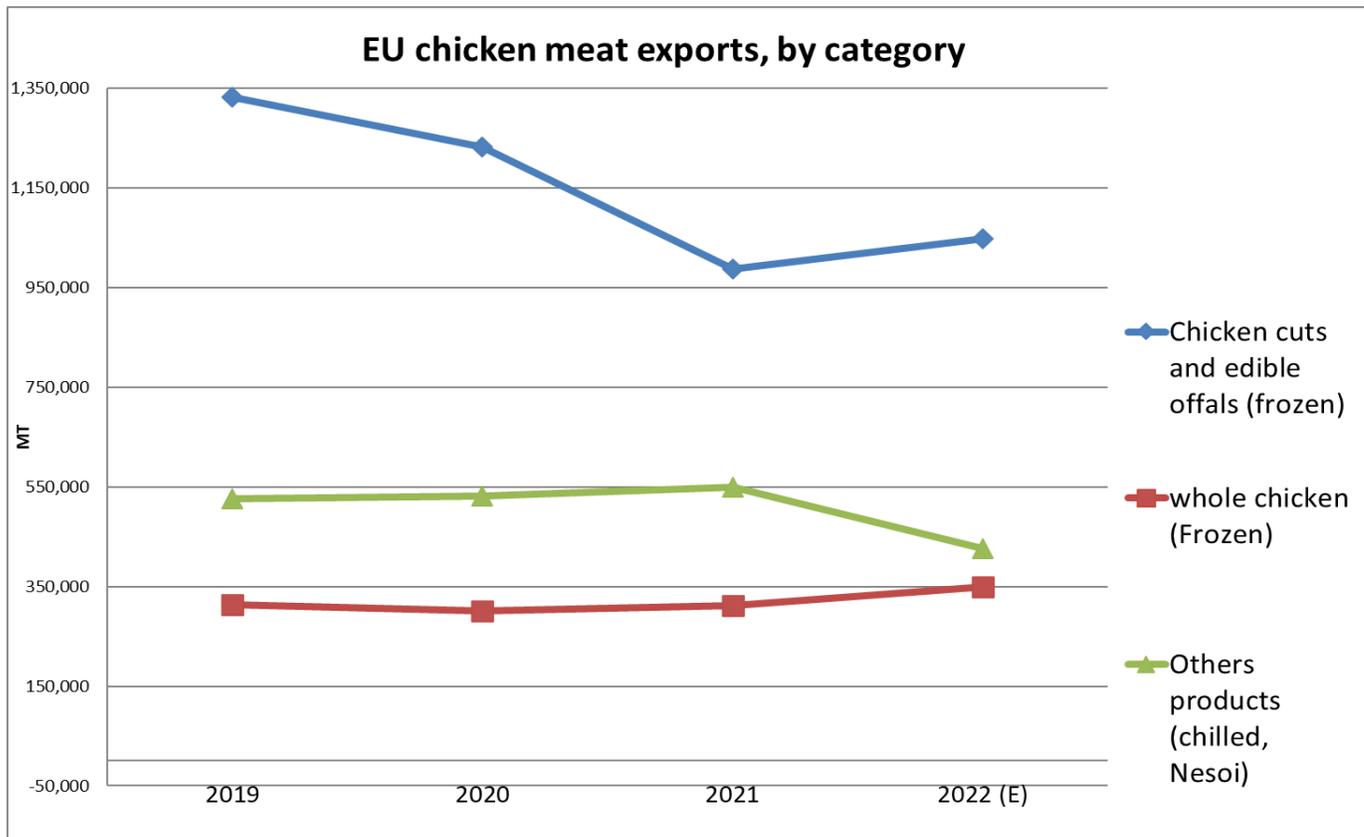
EU-27 exports of frozen cuts to Hong Kong are continuing to decline, due increasing competition from other sources like Thailand and Brazil. Up to 20 percent of EU total chicken meat exports to Hong Kong are made up of frozen chicken feet. These data are not included in FAS chicken meat estimates.

While the Saudi market has typically been more resilient in absorbing higher priced EU chicken meat, this is not the case anymore. Trade data show that Saudi imports of EU chicken meat are now decreasing. This has had a significant impact on French exports of frozen whole chickens. The decrease in EU and French exports is to be linked to the strong competition from Brazil, Ukraine and increasingly from Russia.

After a 60 percent drop in 2021, EU-27 chicken meat exports to South Africa are expected to decline even further in 2022 to less than 4,000 MT, a decrease fueled by the ban on Spanish, Danish, Polish and Dutch chicken meat due to HPAI outbreaks. In addition to increased competition from Brazil and Argentina, EU chicken meat also faces strong competition with United States chicken meat exports to South Africa.

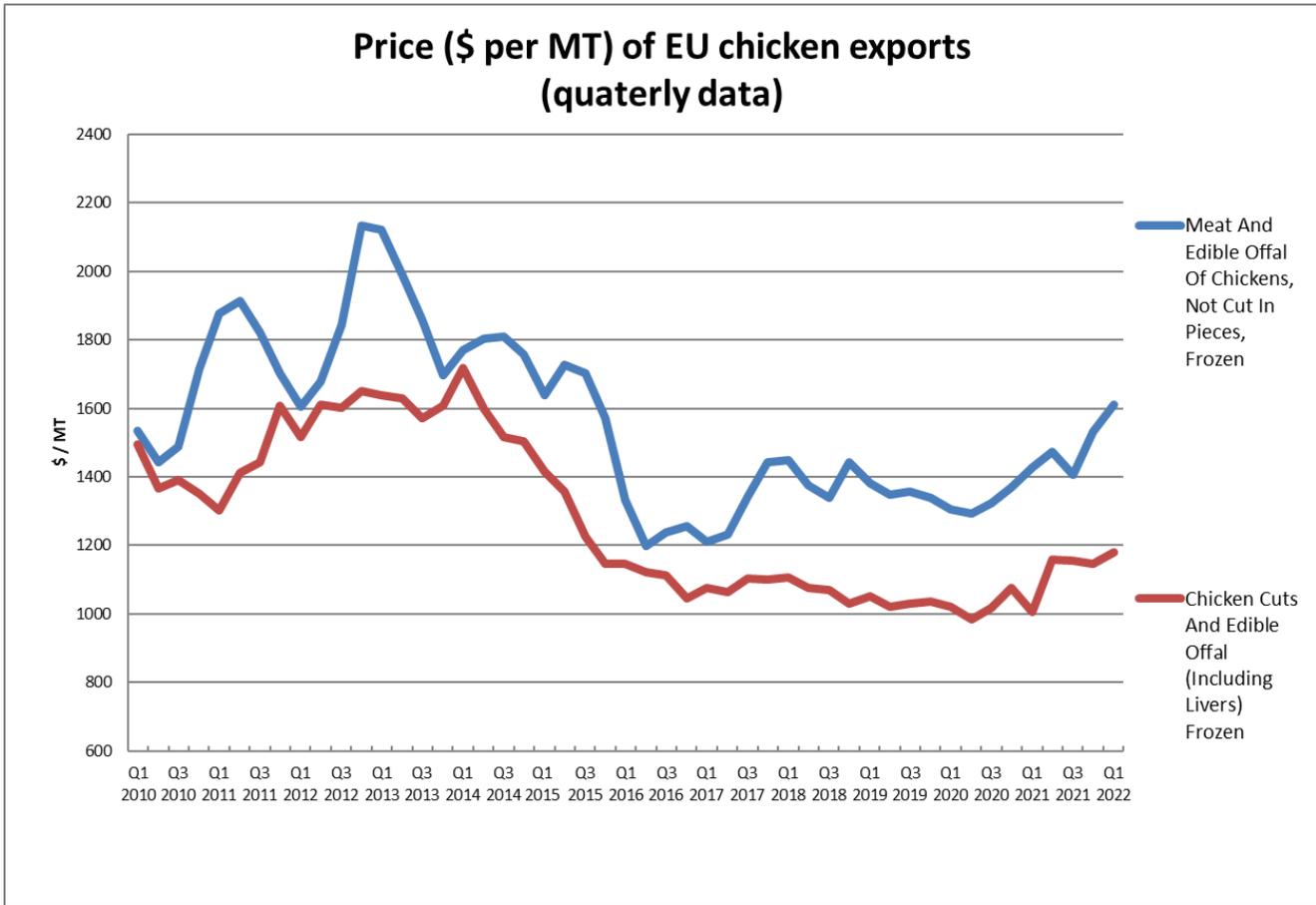
While EU domestic markets favor breast and premium white meat cuts, outside the EU, the export market for dark meat cuts is very competitive. EU chicken meat exports have declined due to HPAI outbreaks and the loss of price competitiveness due to the increasing costs of production.

Figure 10



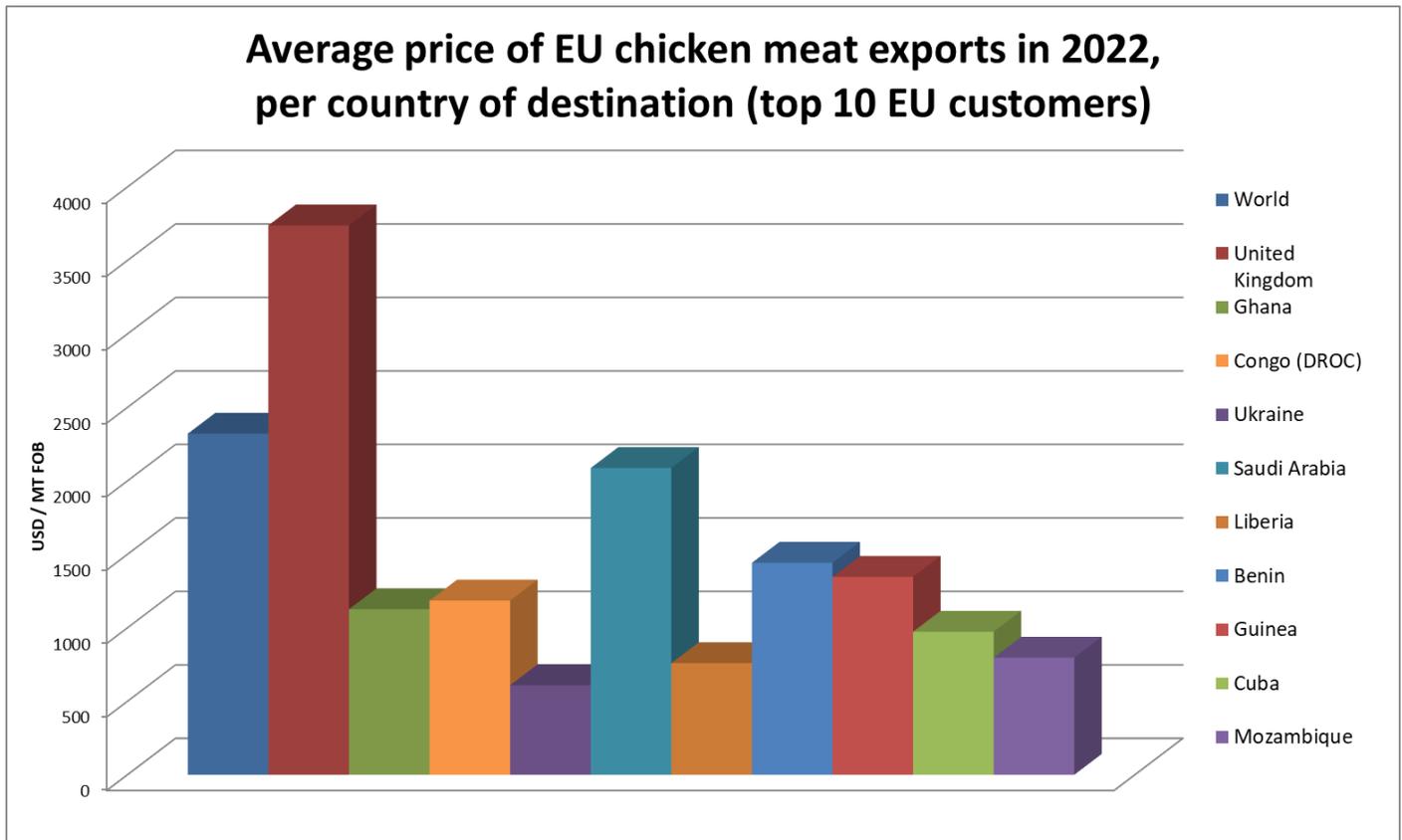
(Source Trade Data Monitor)

Figure 11



(Source Trade Data Monitor)

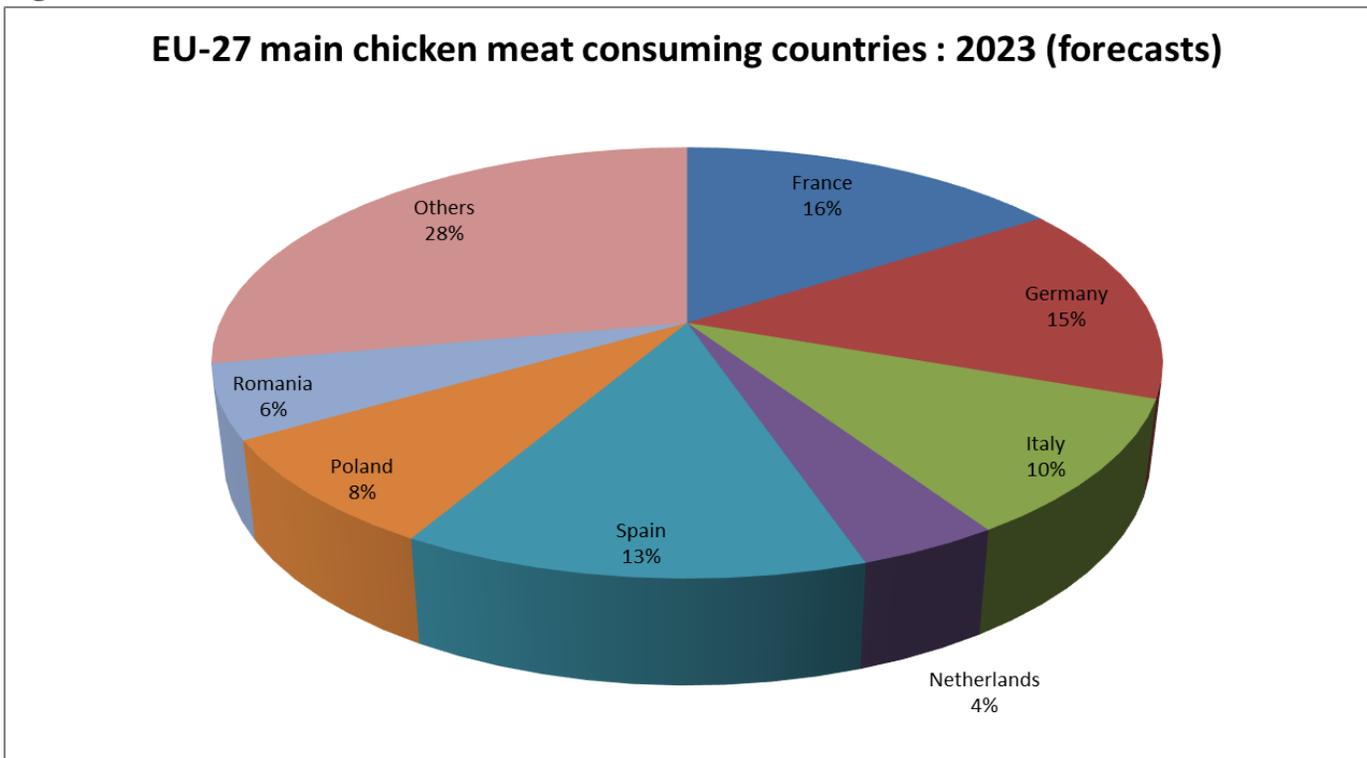
Figure 12



(Source Trade Data Monitor, data for Jan- June 2022)

Domestic Consumption

Figure 13



(Source FAS Posts)

National and private statistical sources show that chicken meat consumption is the preferred (less-expensive) animal protein choice. Chicken consumption was less affected by COVID-19 compared to beef and pork meat. The easing of COVID-19 restrictions and the resumption of tourism is expected to lead to a 2 percent increase in chicken meat consumption in 2022. Data show that growth in chicken consumption is closely related to demographic growth, which means that per capita consumption will remain fairly stable. EU chicken meat consumption in 2022 will likely benefit by the influx of 6 million Ukrainian war refugees in Europe.

Rising food inflation and energy costs in Europe are likely to impact consumption in late 2022 and 2023. However, as the cheaper source of animal protein, chicken meat will likely be less affected. Market studies on price and income elasticity of demand generally show that EU consumers substitute from beef or pork meat to chicken meat while lowest-income consumers tend to reduce purchases of animal protein altogether, switching to carbohydrate products such as bread and pasta.

In Germany and other EU countries, chicken meat is popular in institutional cafeterias, as there are fewer religious restrictions compared to beef and pork. This aspect is increasingly important as communities are becoming more diverse. This is especially true for food service and tourism. In the EU, sales of less expensive cuts such as legs and wings are also increasing.

In several EU countries, such as Germany, France and Poland, the shift to chicken meat consumption is also aided by the perception that it is a healthier and leaner meat, and it is generally easier to prepare.

Consumer demand is increasing for chicken produced with specific methods or feeds. Consumer preferences for animal welfare, such as cage-free and free-range chickens, or type of feed, such as GMO-free chicken or organically produced chicken are increasingly visible on the label and at the point of sale.

In France, the free-range sector is growing, and is marketed under a quality scheme known as “Red Label.” The free-range sector in France represents about 10 percent of total consumption. Public relations campaigns by animal rights organizations such as the L214 association in France have drawn attention to the mistreatment of chicken on poultry farms and slaughterhouses. This has not had a significant impact on chicken meat sales, but these efforts are boosting the development of non-conventional chicken production schemes.

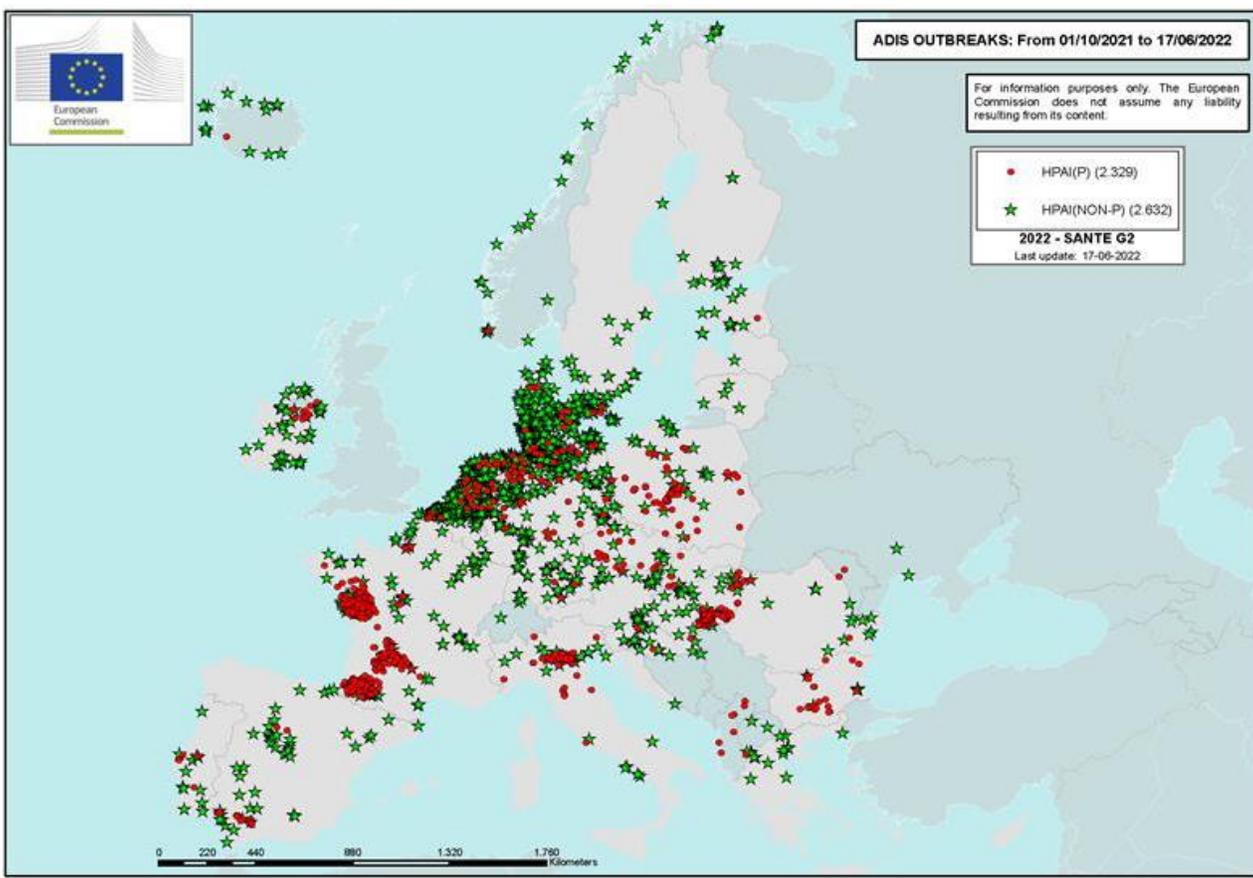
The growth of specific production schemes is also significant in Netherlands, Germany and Austria. In some cases, retail prices for these products are double the price of their conventional alternatives. There is also a significant development of locally sourced chicken as a demand driver. This is the case in Austria, with retailers advertising local and regional suppliers. The dilemma of course is that while many consumers say they want to purchase locally produced chicken, these same consumers are also often reluctant to have poultry farms States in their communities.

Policy

Highly Pathogenic Avian Influenza (HPAI) Situation Update

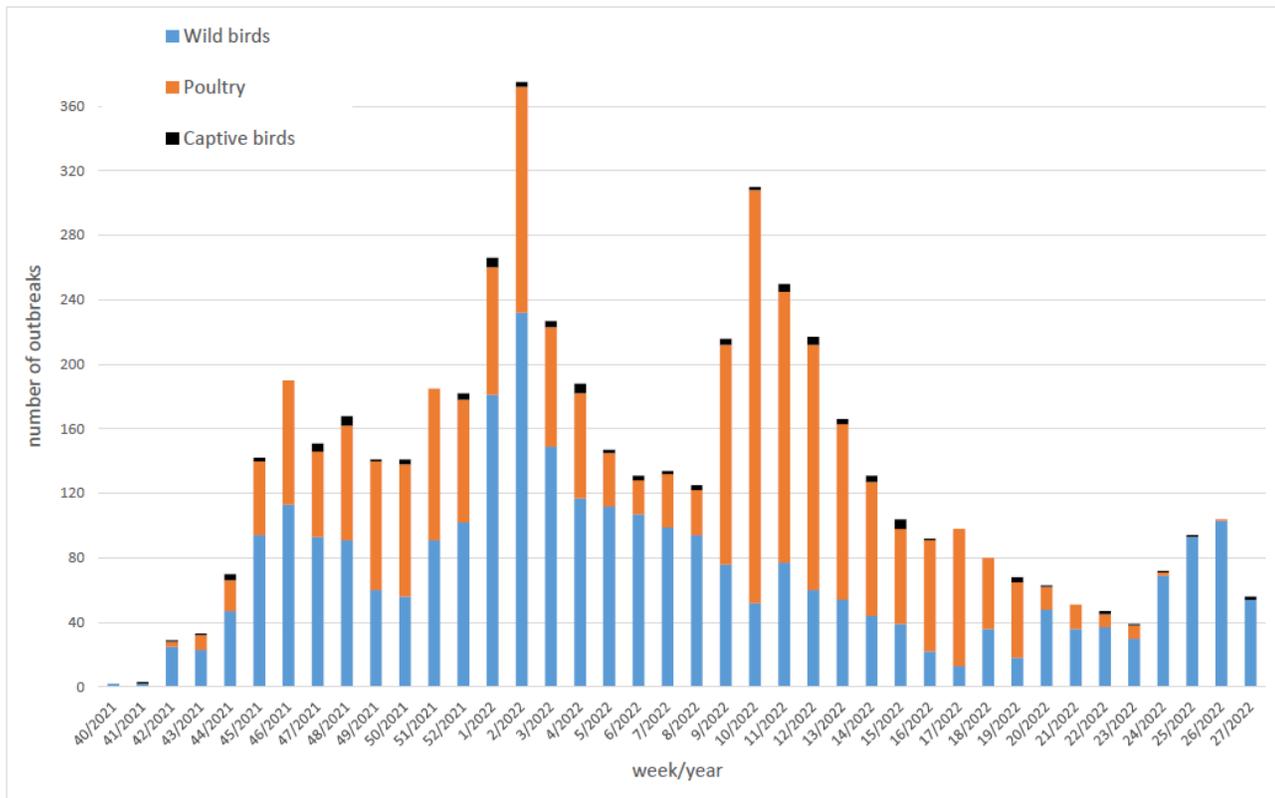
According to a [scientific report](#) from the European Food Safety Authority (EFSA), the 2021–2022 highly pathogenic avian influenza (HPAI) epidemic season has been one of the largest ever observed in Europe, with a total of 2,398 outbreaks, leading to the culling of 46 million birds (including 16 million in France alone.) As more AI infections continue to be found, there is speculation that the disease has become endemic in wild birds across the European union.

Figure 14



(Source EU Commission https://food.ec.europa.eu/animals/animal-diseases/diseases-and-control-measures/avian-influenza_en)

Figure 15



Source: Istituto Zooprofilattico Sperimentale delle Venezie (IZSVe)

Veterinary Medicine Legislation

On December 11, 2018, the EU approved its new framework for [veterinary medicine regulation \(Regulation \(EU\) 2019/6\)](#). The final implementation date was January 28, 2022. Drafts for the [implementing legislation](#), including the list of antibiotics that will be exclusively preserved for human medicine and the modalities of use for permissible products, are going through the approval procedure. On October 6, 2021, [Commission Delegated Regulation \(EU\) 2021/1760](#) establishing the criteria for the designation of antimicrobials to be reserved for the treatment of certain infections in humans was published. The European Medicines Agency (EMA) was [mandated](#) to draft a proposal for a list of antibiotics reserved for human medicine based on these criteria. This list missed the January 28 implementation date of the veterinary medicine regulation, but was approved by the Council on July 4, 2022 and is expected to be published shortly.

On October 8, 2021, the official controls enshrined in [Regulation \(EU\) 2021/1756](#) of the European Parliament and of the Council of 6 October 2021, amending Regulation (EU) 2017/625, was published in the Official Journal in order to ensure compliance with the prohibition of certain uses of antimicrobials. A draft Delegated Act for the Implementation of Article 118 imposing limitations on the use of antibiotics for animals in the EU that will apply to operators in third countries, has also yet to be proposed.

New EU Animal Welfare (AW) Legislative Initiatives Start with Animal Transportation Issues

At the July 18, 2022 EU Agricultural Council meeting, Denmark, on behalf of five member states (Belgium, Denmark, the Netherlands, Germany and Sweden), presented a [position paper](#) to strengthen EU rules on animal transportation and to reduce the maximum journey length. This initiative follows months of debate, including in the European Parliament, of continued issues with animal welfare, mostly in maritime animal transportation.

On July 5, 2021, the European Parliament's Committee of Inquiry on the Protection of Animals during Transport (ANIT), which was set up to investigate the implementation and enforcement of the EU's AW legislation, published a [report](#) on livestock transport in the EU and to third countries. The report described patterns in the European transport routes of 1.3 billion animals per year and possible avenues for improved AW.

On January 21, 2022, a public consultation ended on the EU's AW [inception impact assessment](#), which was published on July 6, 2021. This impact assessment marks the beginning of an [EU revision](#) of its AW legislation, which is one of the goals of the EU's Farm to Fork (F2F) strategy. The public consultation received 983 comments, including from the [UNITED STATES Meat Export Federation](#). The goal is to adopt new legislative proposals for AW on farMember States, during transport and in the slaughterhouse by the end of 2023. A renewed [AW platform](#) was installed in May 2021 as an advisory body to inform the EC on these proposals. New initiatives for AW labeling are also being discussed and the subgroup on AW labeling of the EU's AW Platform presented its [conclusions](#) in the summer of 2021.

Related reports from FAS Posts in the European Union:

July 27, 2022 [Dutch Farmer Protests Against New Nitrogen GHG Emissions Reductions Policies NL2022-0041](#)

May 06, 2022 [Avian Influenza Confirmed in Commercial Flocks in Poland PL2022-0008](#)

April 22, 2022 [Avian Influenza Detected in Key Dutch Poultry Region NL2022-0023](#)

April 22, 2022 [Ongoing HPAI Outbreaks Threaten the Future of France Egg and Poultry Industry FR2022-0003](#)

The GAIN Reports can be downloaded from the following FAS website:

<http://gain.fas.usda.gov/Pages/Default.aspx>

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Attachments:

No Attachments