

AVEC, ELPHA & EPB



AVEC is **the voice of Europe's poultry meat sector**, a trade organisation representing **95%** of poultry meat produced in Europe (27+UK).

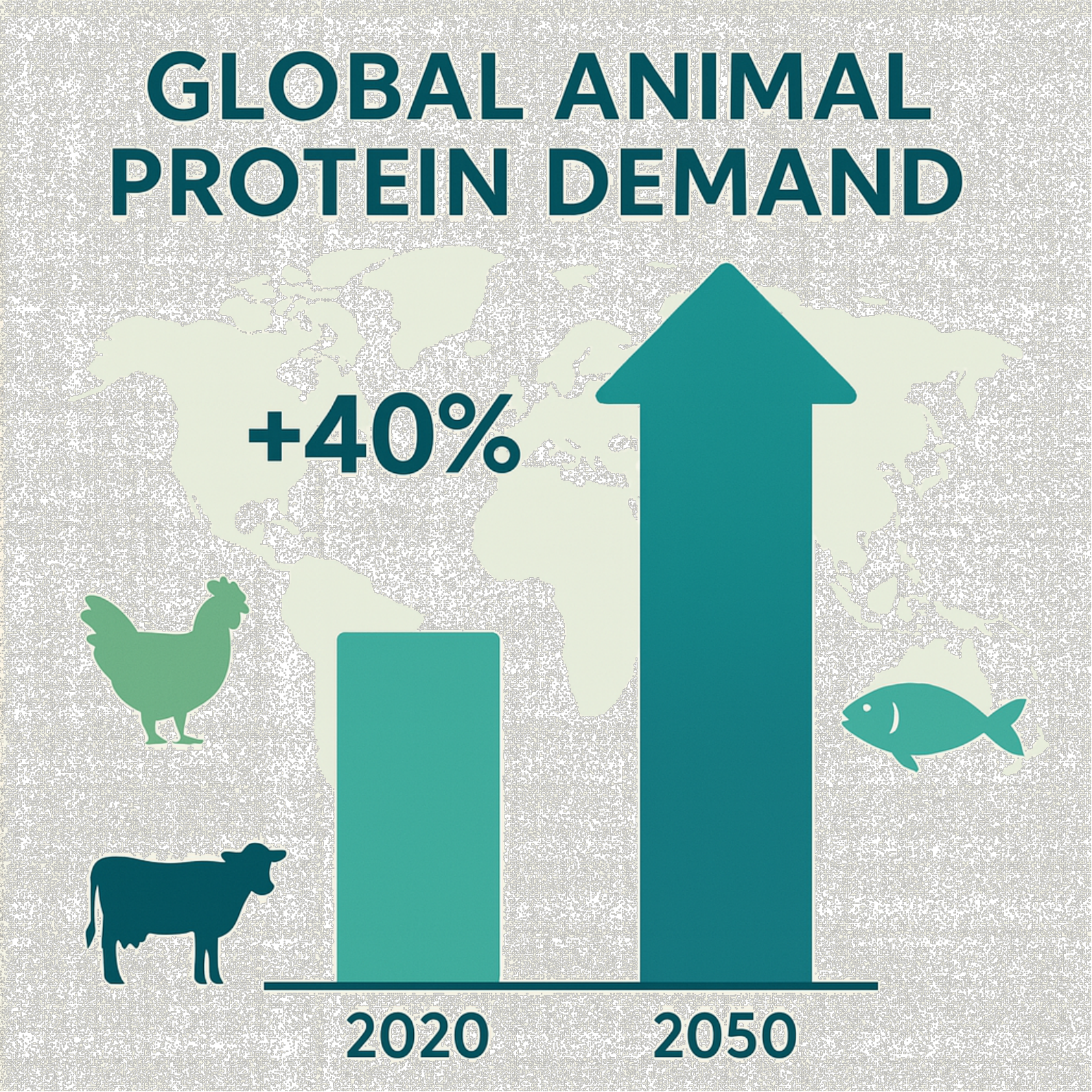
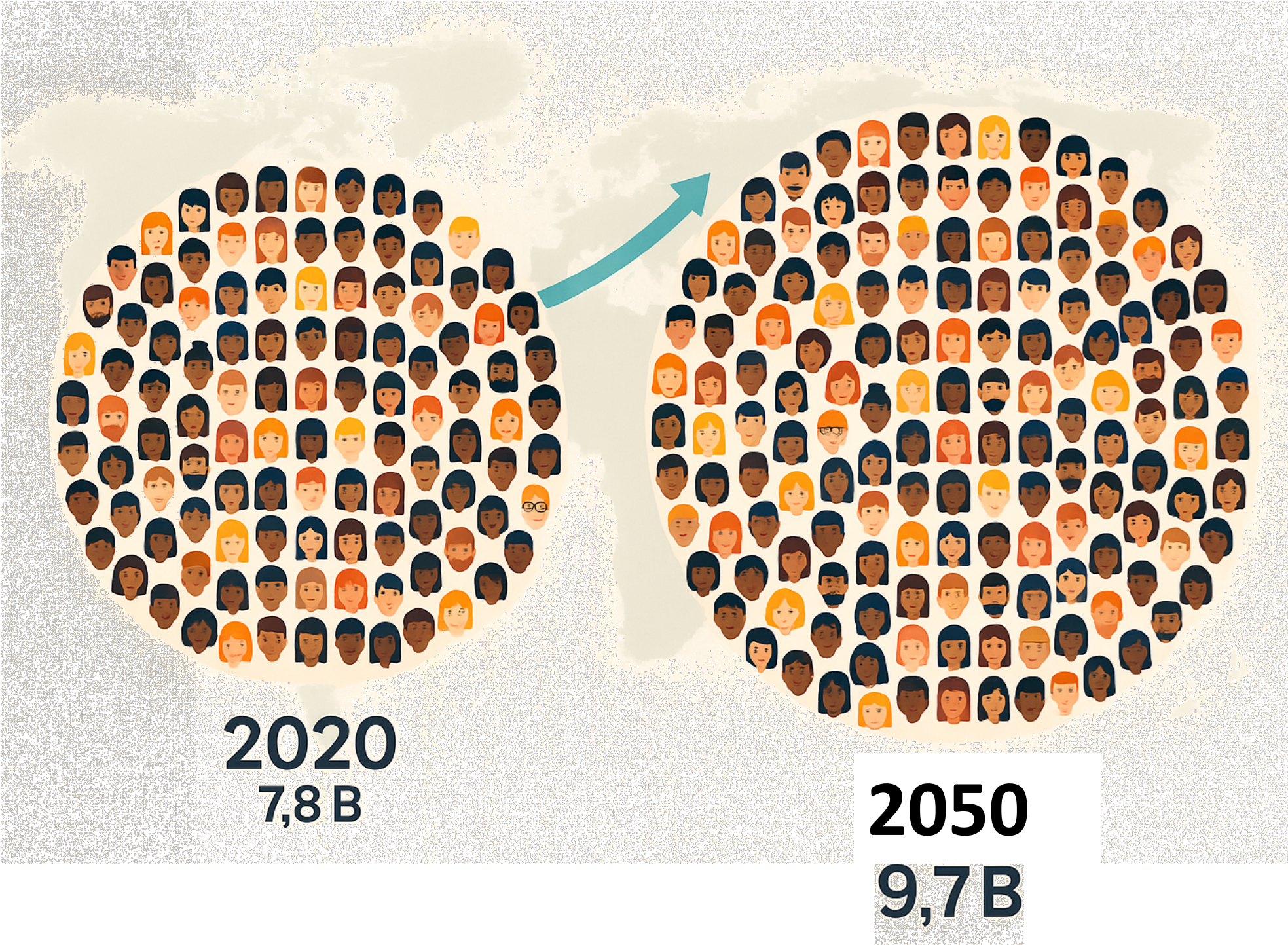


Covering the chain from **Breed to Meat**



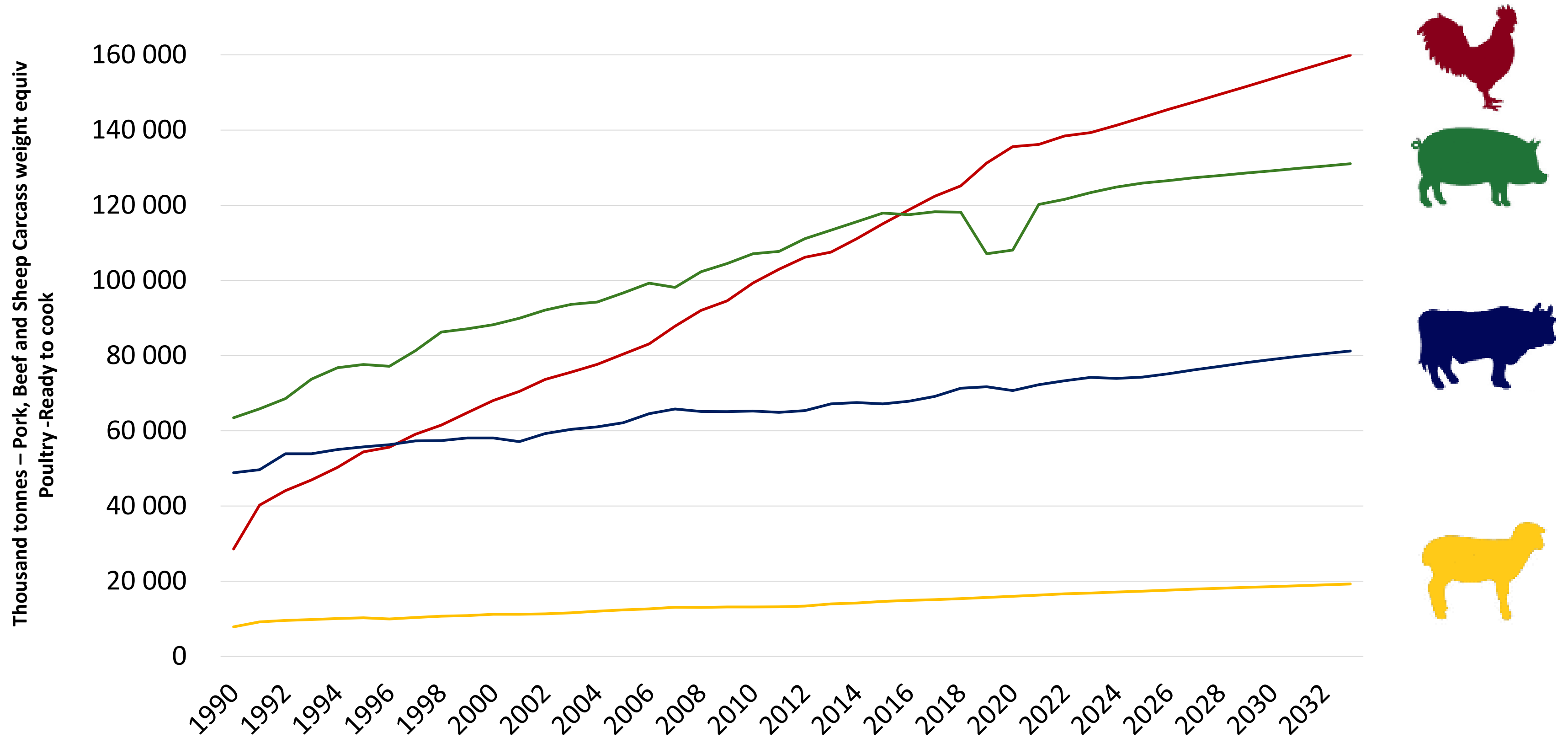
FACTS AND FIGURES

More people ... **higher food demand**



Source: Rabobank.

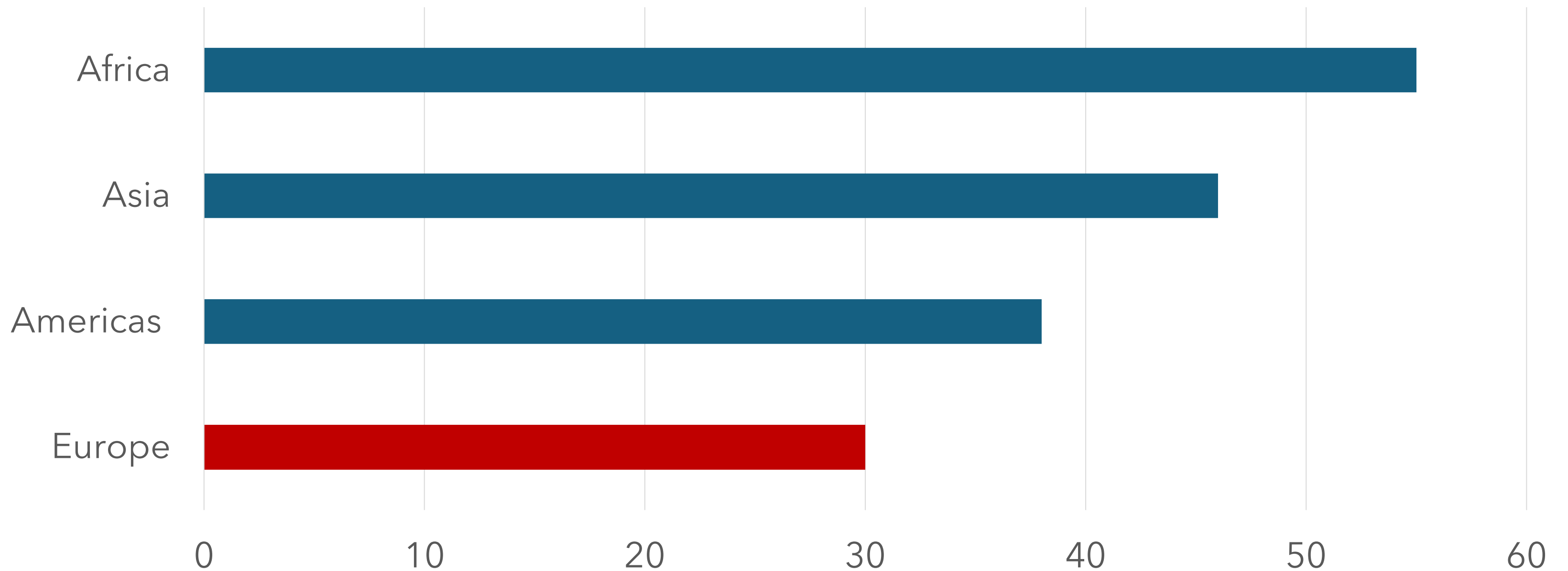
Meat consumption forecast - World



Emissions DO NOT Respect Borders

Average cradle-to-farm-gate footprint of all livestock products
(FAO GLEAM 3, baseline 2015)

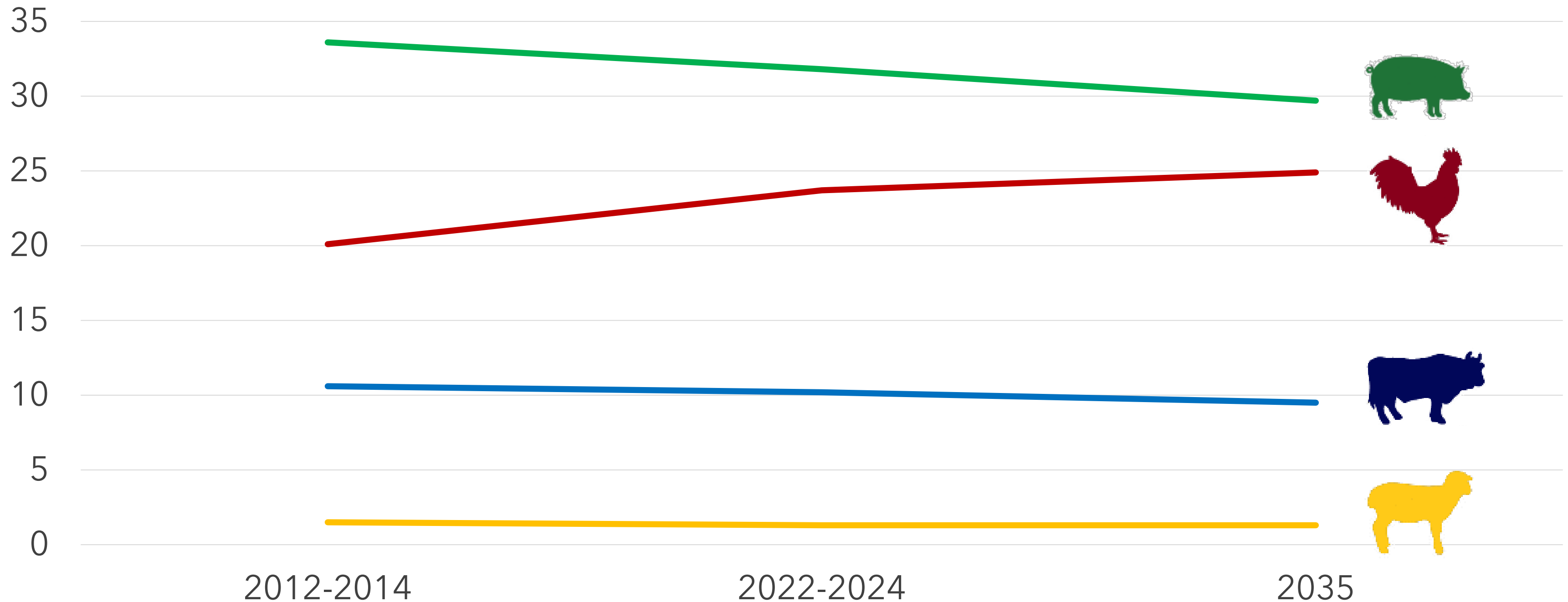
kg CO₂-eq / kg protein



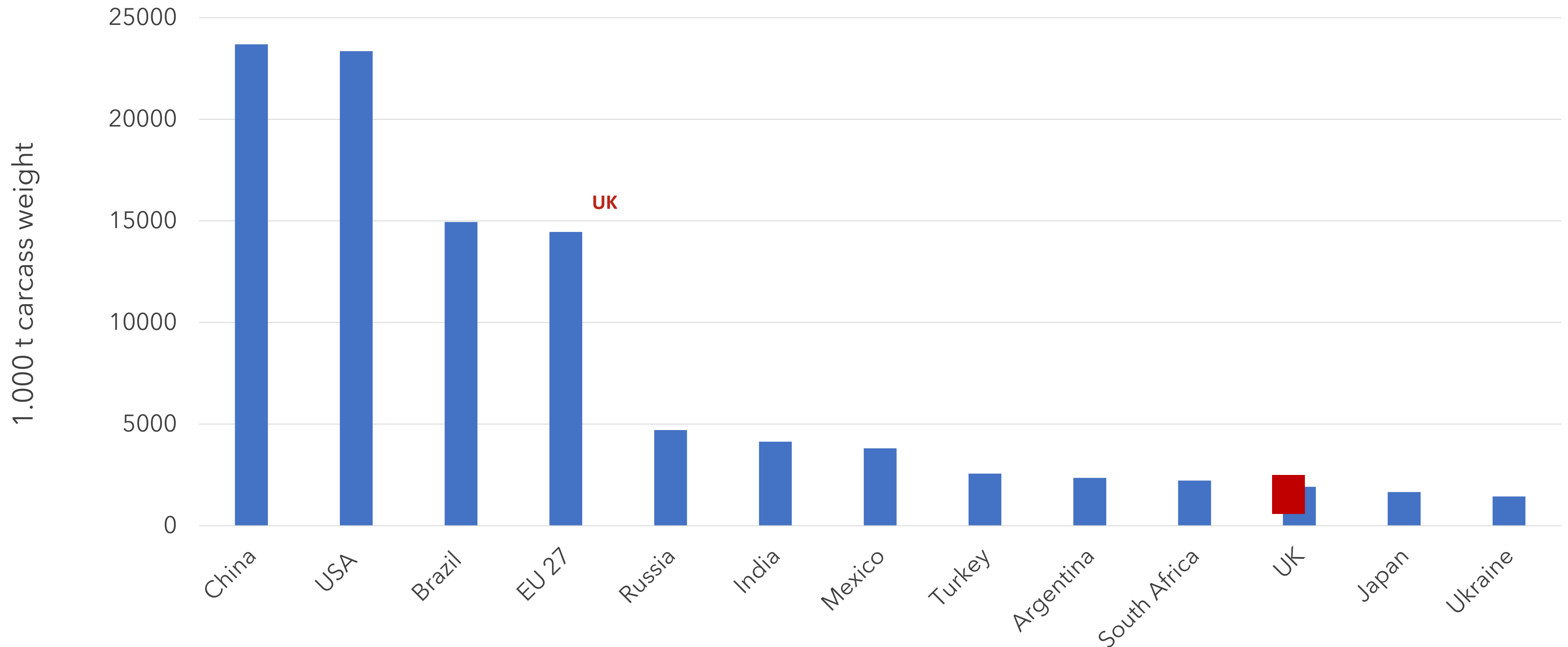
Meat consumption forecast - EU



EU per capita meat consumption by meat type (kg)

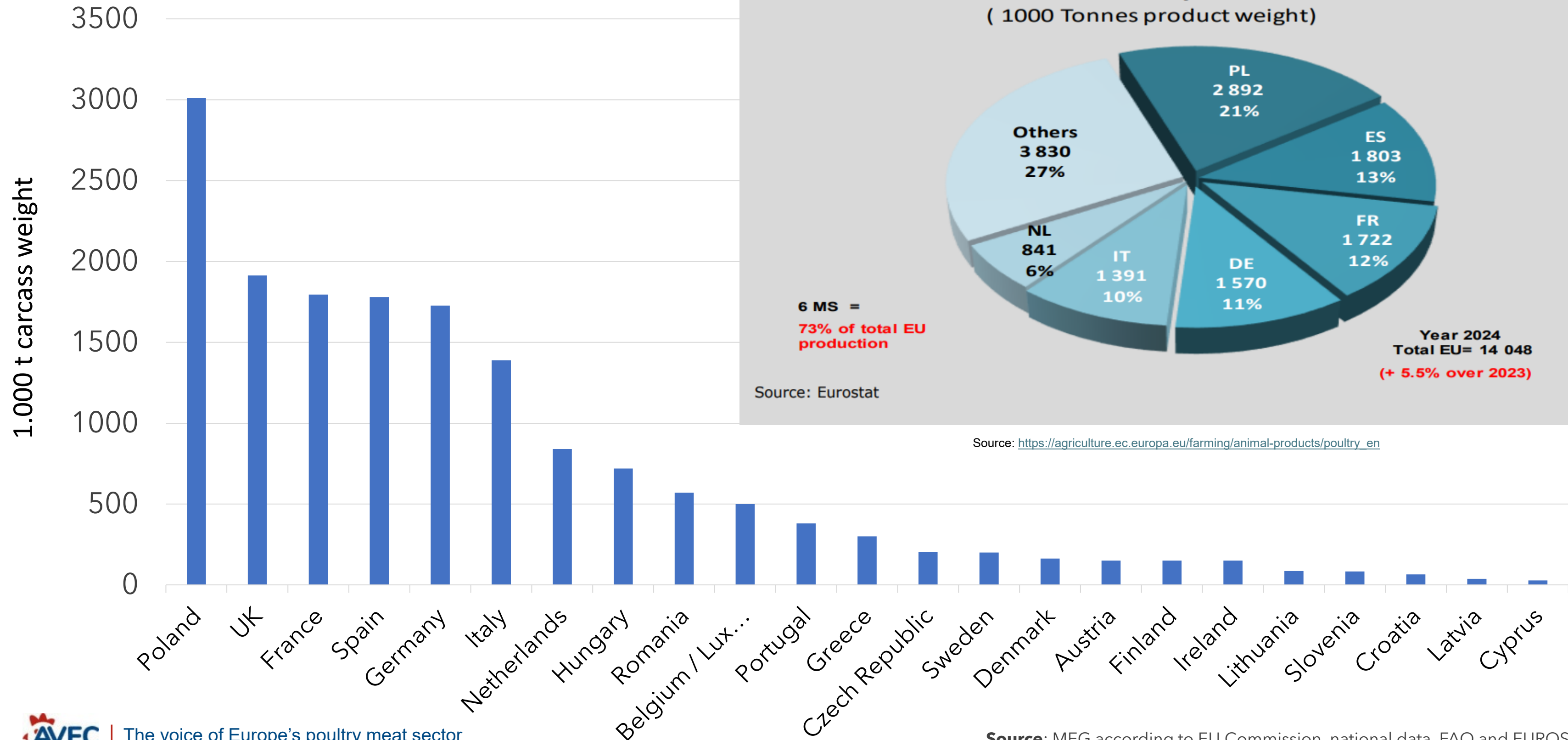


Production of poultry meat - World 2024





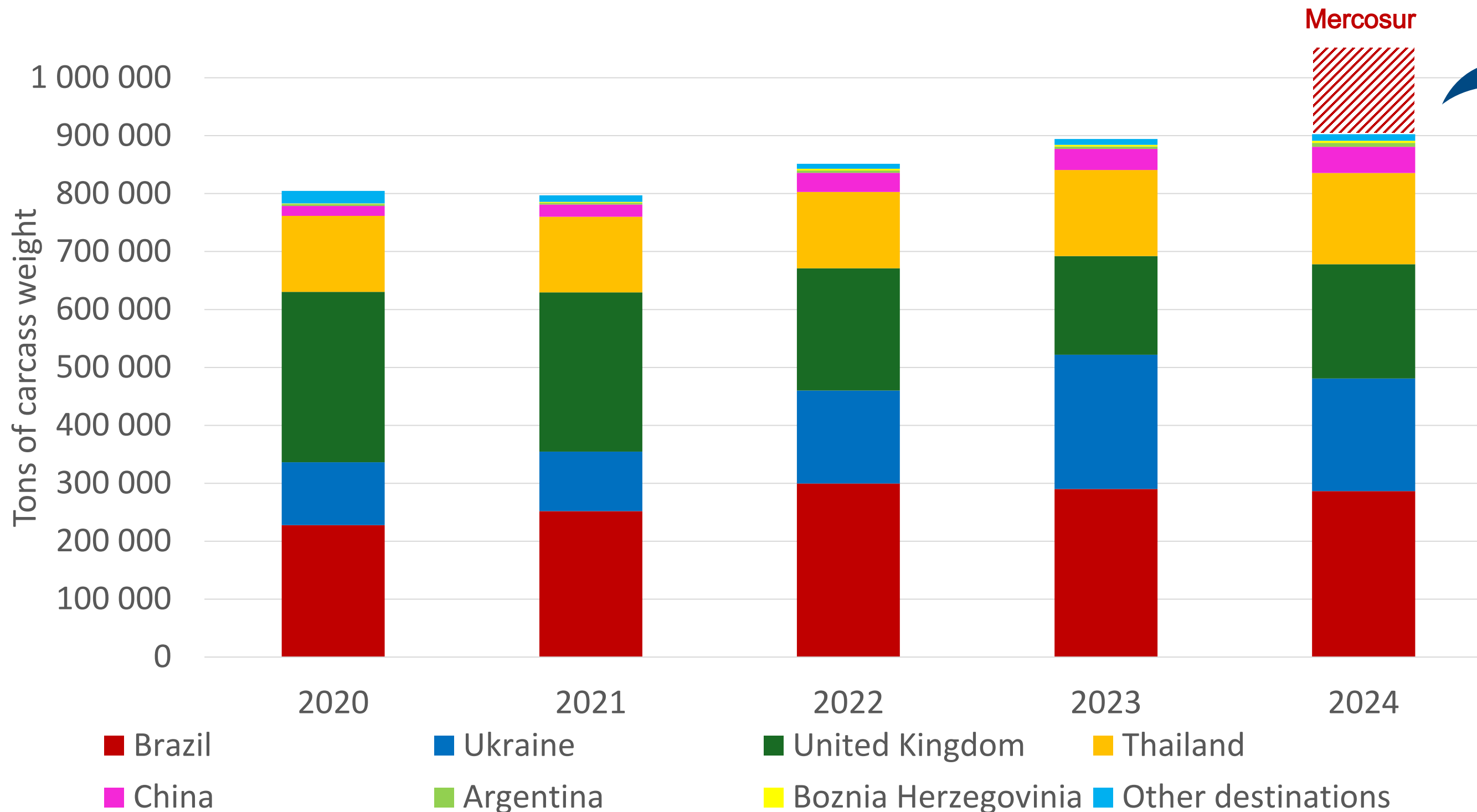
Production of poultry meat - Europe 2024



Challenge 1: Geopolitics and trade



Imports of Poultry Meat to EU



Mercosur countries (Brazil + Argentina):
 already **293 000 T of imports in 2024**
 for a value of **640 Million €**

= 1/3

of **EU imports** in quantity and value already



Thailand, Chile, Ukraine, China...

Cumulative Impact of Poultry Imports

9 % of total EU consumption & 25-30 % of poultry breast meat consumed in EU are coming from **3rd countries**.

Why
don't we see
it in the
supermarket?

AVEC
THE VOICE OF EUROPE'S
POULTRY MEAT SECTOR

25% IMPORTS
CHICKEN BREAST MEAT IS COMING FROM 3RD COUNTRIES

UKRAINE, THAILAND & BRAZIL

MAINLY SOLD IN:

FOOD SERVICE
EX. RESTAURANTS, SCHOOL CANTEENS

PROCESSED FOOD
IN SUPERMARKETS, EX. NUGGETS, SAUSAGE, ...

WE NEED LABELLING OF ORIGIN

OR

Mercosur Negotiations



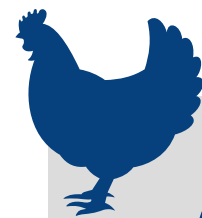
*Every time **TWO** breast fillets are imported to EU - **ONE** less chicken will be raised in the EU

➤➤➤➤ **180.000 T**

TRQ offered by EU COM to Mercosur
90.000 T bone in /90.000 T boneless (= breast fillets)



“How much is that?”



300.000.000

Chickens

6.000.000/ Week

NOT produced in the EU

OR

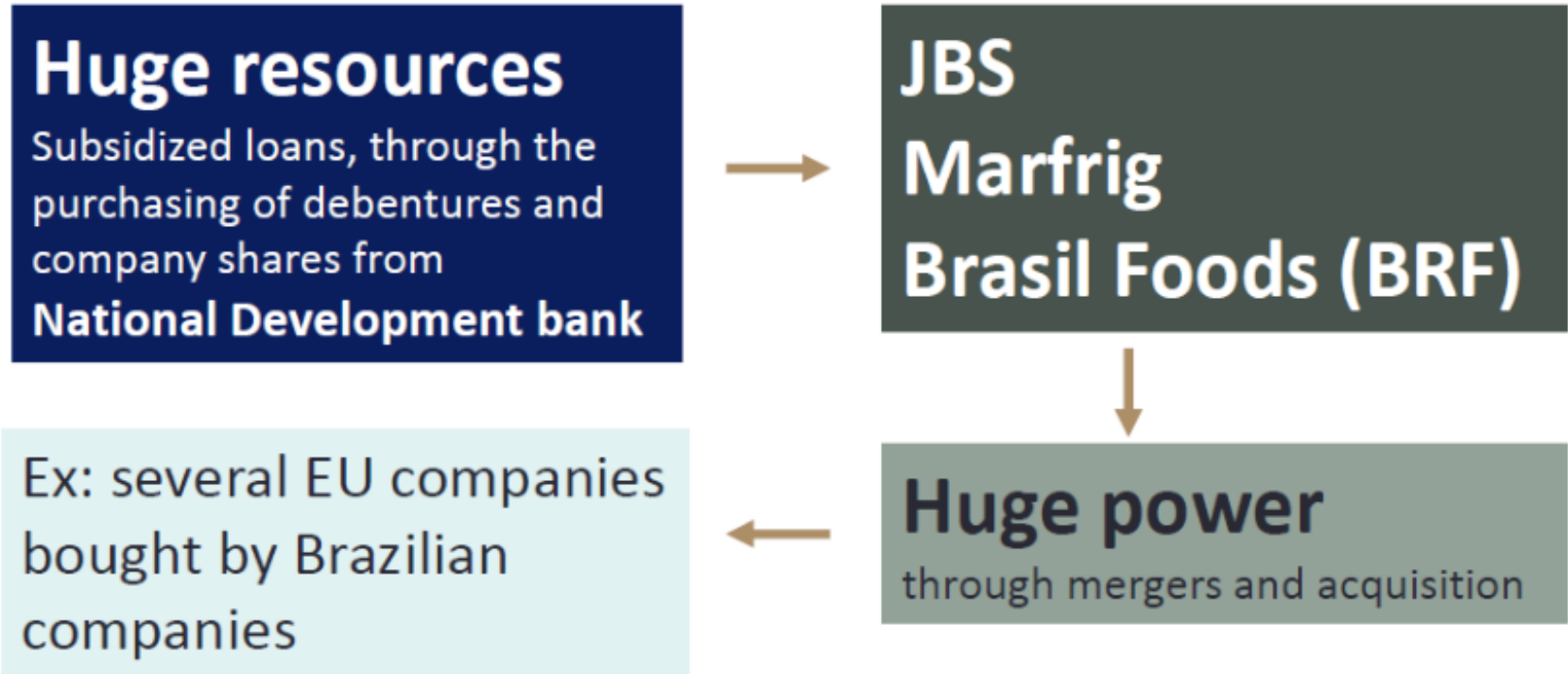
Combined **production of:**



Creation of Brazilian Champions

Brazil's National Champions Strategy

From 2007 to 2013, the Brazilian National Development Bank started the **"National Champions Policy"** to select Brazilian exporting companies and transform them into large transnational corporations that bring home big revenue.



Million heads (broilers) slaughtered per year

	Company	Country	Mio heads slaughtered per year
	JBS	Brazil	4,426
	Seara Foods	Brazil	2,008
	BRF	Brazil	1,724
	Total 3 main Brazilian companies:		8,158

	Company	Country	Mio heads slaughtered per year
	LDC Group	France	579
	Plukon Food Group	Netherlands	468
	Gruppo Veronesi (AIA)	Italy	350
	PHW Group (Wiesenhof)	Germany	350
	2 Sisters Food Group	United Kingdom	520
	Total 5 main EU+UK companies:		2,267

TRQ Management

1 | Historically, the EU decided to keep the management of the quotas for sensitive products under its control.



2 | The **management of the TRQs for the new Mercosur quotas MUST stay in the EU.**

3 | Brazil has developed a mechanism using certificates of origin to **keep controls of existing quotas and favour its big companies.**

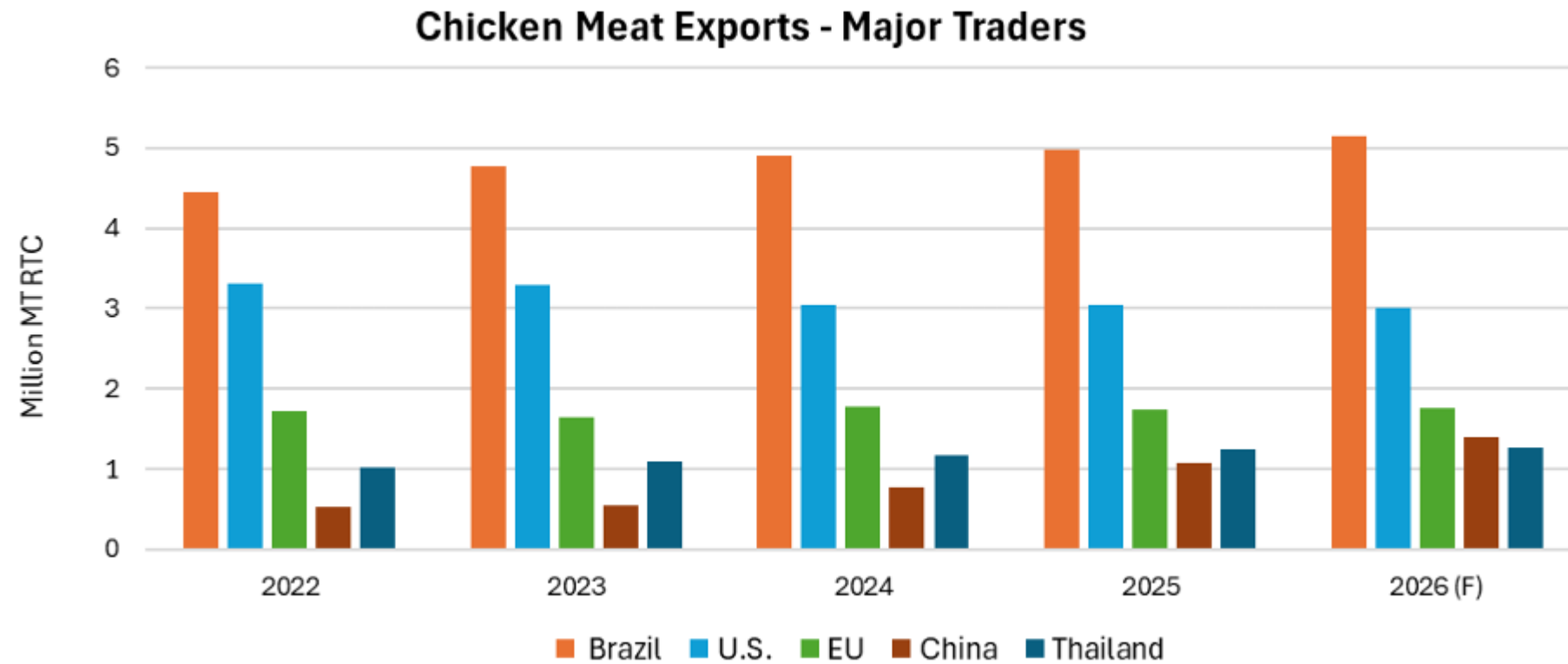


4 | Totally **unacceptable** and this **should not be allowed** in Mercosur!



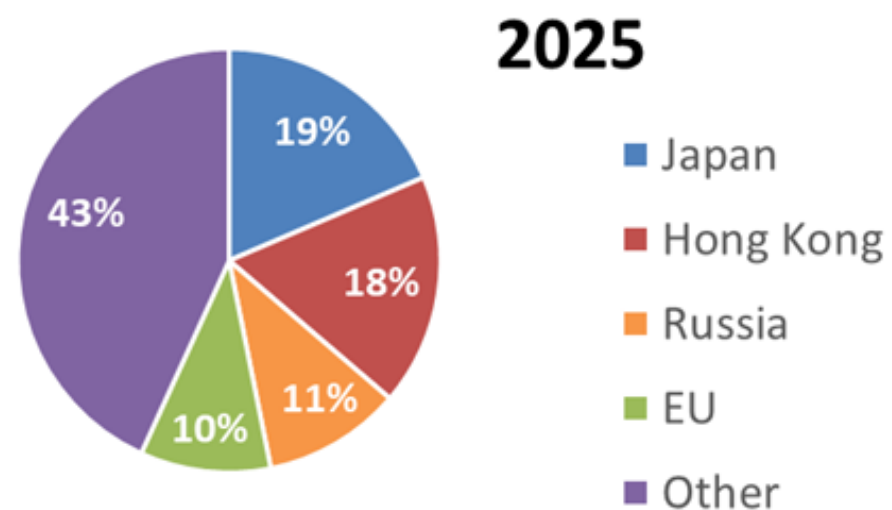
China - From net Importer to net Exporter?

China Chicken Meat Exports Continue to Soar in 2026, Surpassing Thailand



Source: https://apps.fas.usda.gov/psdonline/circulars/livestock_poultry.pdf

Destinations of China Chicken Exports

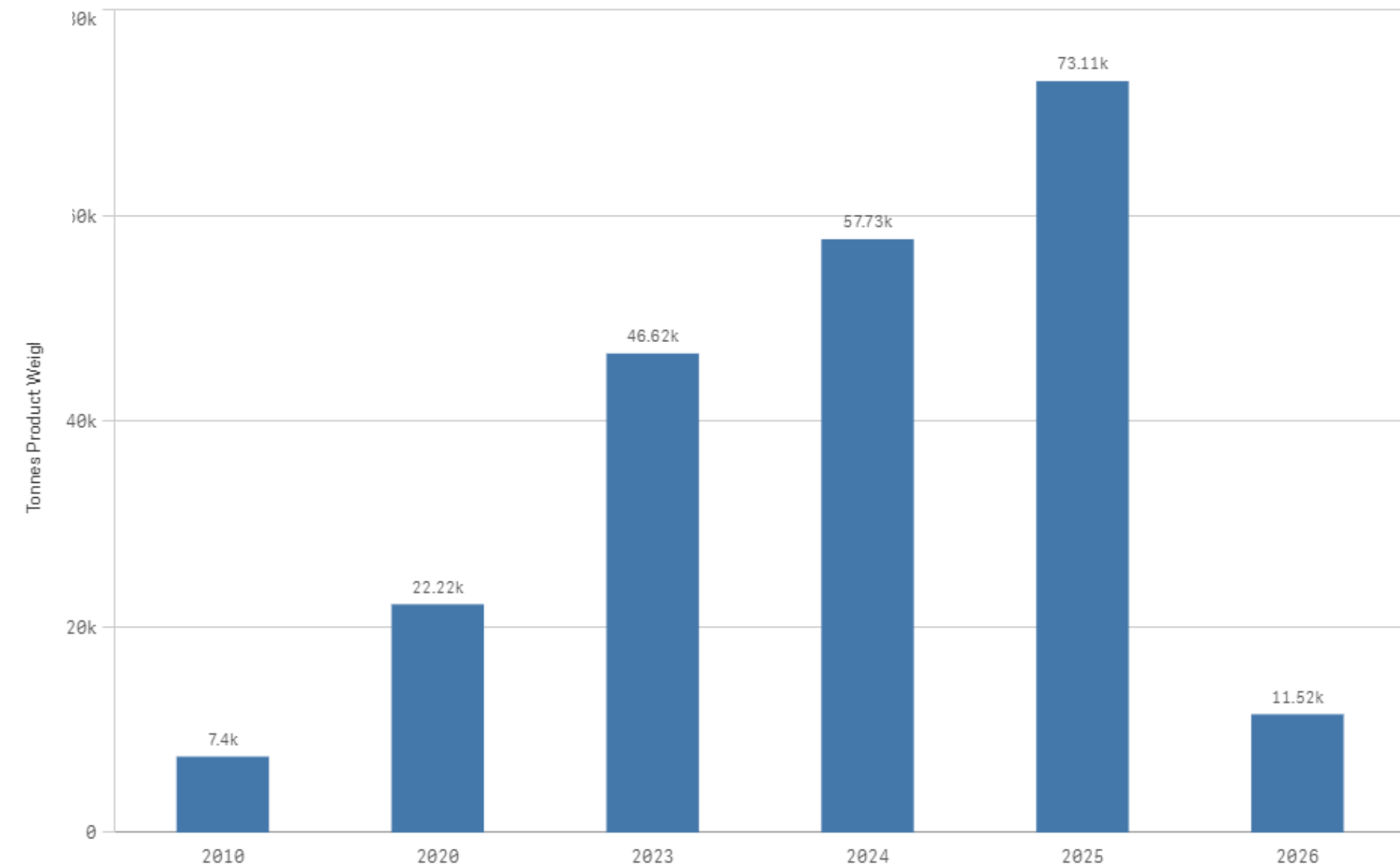


Source: Trade Data Monitor

Poultry imports into the EU on the rise

EU Trade, Product Weight in tonnes

Import: all product groups, partner: China, Year: 2010, 2020, 2023, 2024, 2025, 2026, all months



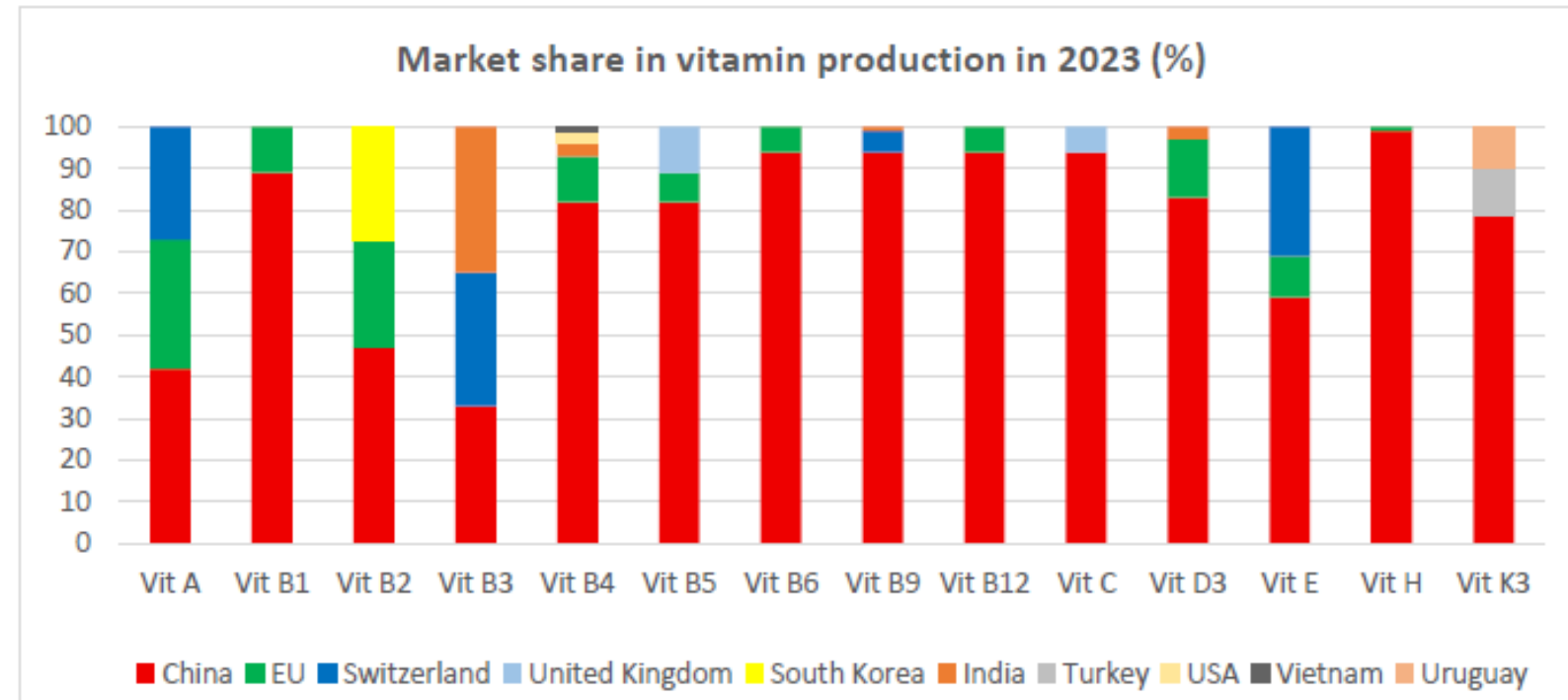
Source: <https://agridata.ec.europa.eu/extensions/DashboardPoultry/PoultryTrade.html>



We are dependent on China for nutrients

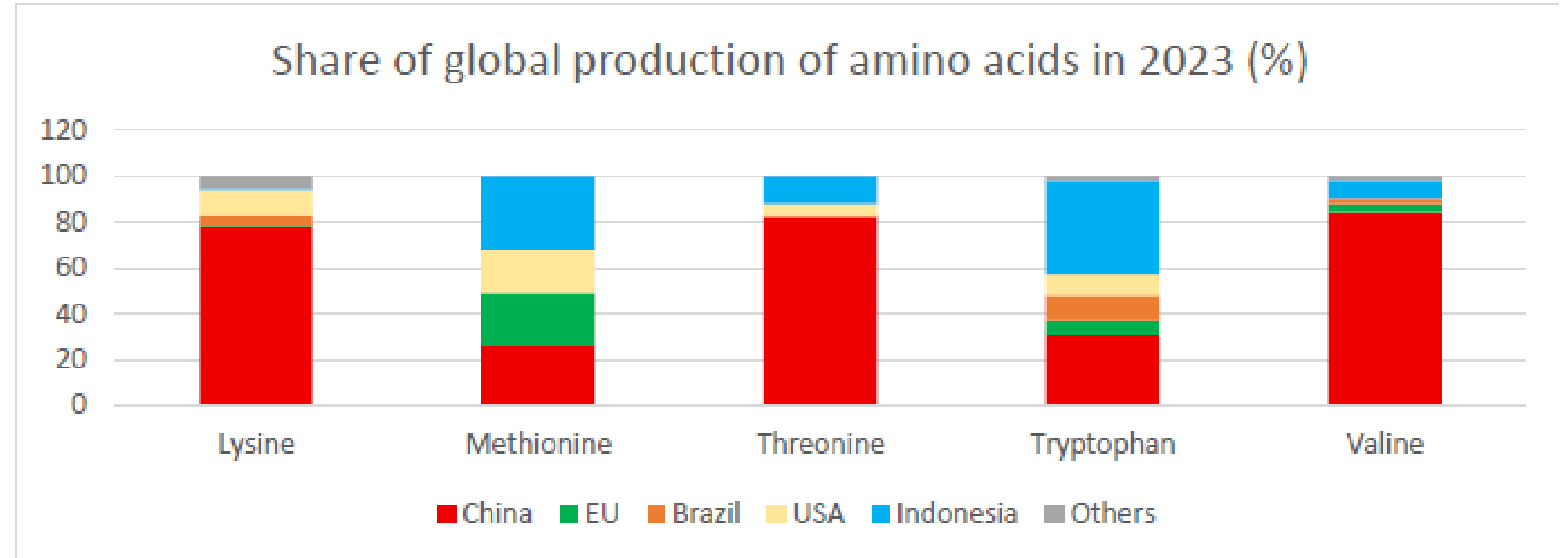
Global market concentration

China is the only country producing all vitamins with a global market share between 34 and 99%.



Global market concentration

China is the only country producing the 5 most essential amino acids, with a global market share between 25 and 85%.



US-Iran war: Potential Impact on EU poultry



1 Higher production costs

from rising energy prices: heating, electricity, processing, refrigeration and transport.

2 Feed cost pressure

if fertiliser and crop markets are disrupted, especially for maize and soy.

3 Logistics risks:

Longer routes, higher freight and insurance costs, possible delays for breeding stock and feed ingredients.

4 Margin squeeze

for EU producers and processors if costs rise faster than market prices.

5 Demand may remain resilient,

as poultry is a relatively affordable protein during economic pressure.



Key message:

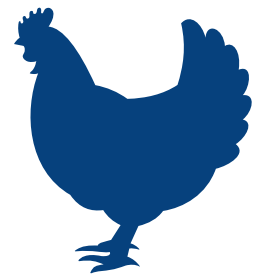
Limited short-term disruption, but prolonged escalation could strongly increase costs across the EU poultry value chain.

Challenge 2: Accession of Ukraine to the EU



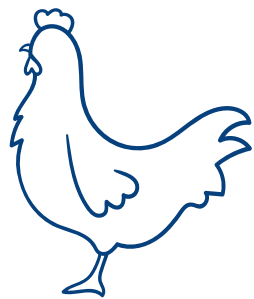
Trade - Current situation

In June, the EU replaced the emergency Autonomous Trade Measures for Ukraine with a **balanced, trigger-based system of tariff-rate quotas**:



IMPORTS

Of Poultry Meat: 120.000 T (product weight)
< 137.000 T (2024 ATM)



EXPORTS

Of Poultry Meat: 120.000 T
> 20.000 T (past)



In **2023**, full trade liberalisation with Ukraine led to **174.000 T of imports...**



Main Characteristics of the **Ukrainian Production**



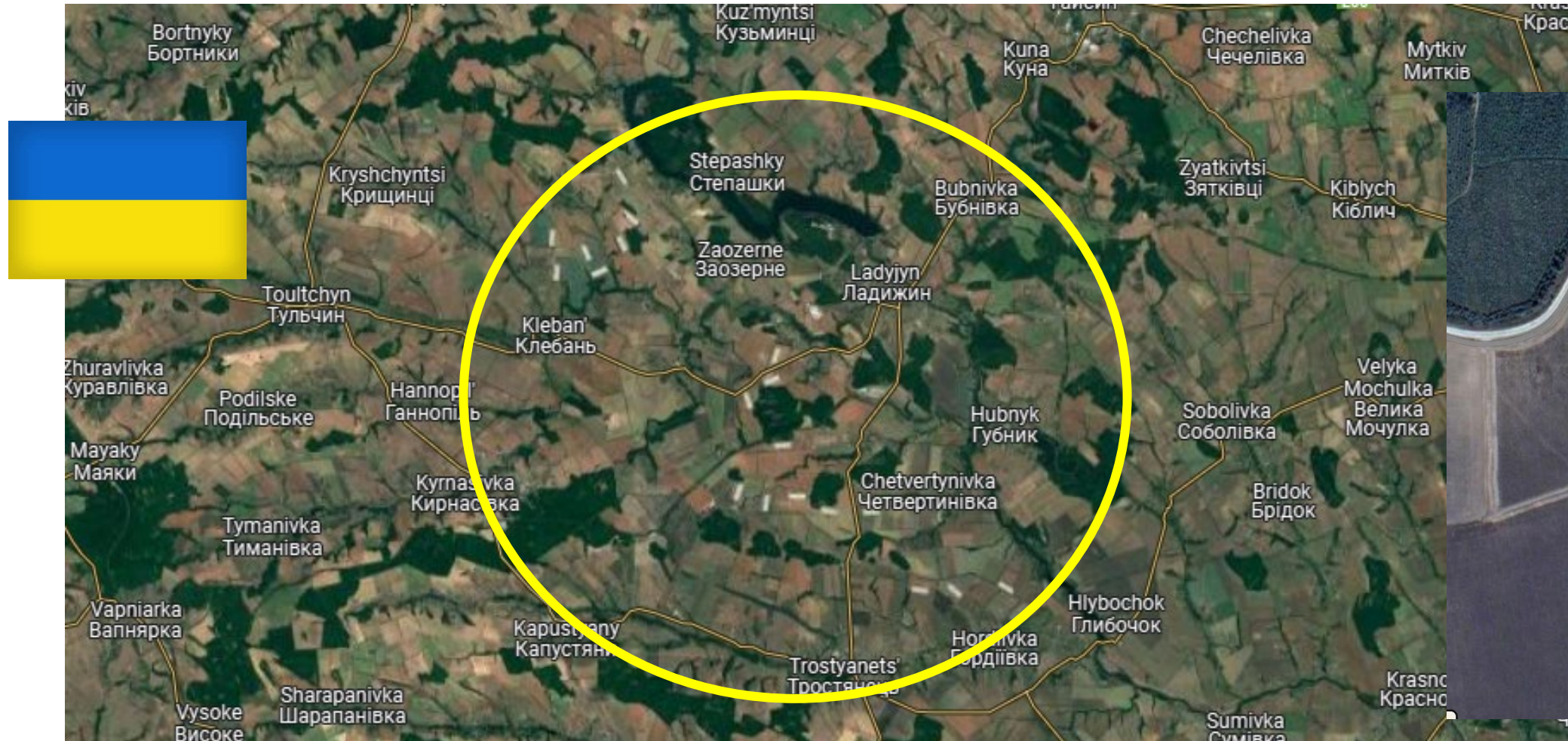
Due to:

- **feed availability**
- **land ownership** (lease of 360 k ha)
- **labour costs**
- **full integration system** (no farmers – only employees)
- **lower standards** (on animal welfare, PAPs, environmental permits)
- excellent **access to finance** →
- financial mechanism to allocate profits
- **production optimisation** (for different markets)
- **extra profits** from use of by-products and selling of the grain
- **state of the art production**

Lending to MHP by IFC, EBRD and EIB		
Year	Bank	Amount (million US\$)
2003	IFC	30
2005	IFC	80
2010	IFC	61
	EBRD	65
2012	IFC	50
	EIB	90
2013	EBRD	100
2014	IFC	100
2015	EBRD	85
2017	EBRD	27
2022	EBRD	26
2023	IFC	130
	EBRD	100
	EBRD	90
Total		1,034

Source: <https://www.oaklandinstitute.org/blog/when-european-institutions-sacrifice-farmers-corporate-profit>

Ukrainian Poultry Meat Production



35km zone in Ukraine



19
Poultry
"Sites"

36
Houses per
site

55.000
Heads in each
poultry house

39 mil chickens

JOINT POSITION OF UKRAINIAN AGRICULTURAL ASSOCIATIONS ON THE EU INTEGRATION PROCESS



2 COUNTING FROM THE DATE OF ACCESSION

- ✓ The transition period must **begin at the moment of Ukraine's accession to the EU** and cannot be linked to any date prior to membership.

3 ACCESS TO CAP SUPPORT

- ✓ Ukrainian farmers **must have access to the support instruments of the CAP from the beginning of the transition period** — in accordance with the CAP rules in force at the time of accession, taking into account the agreed transitional provisions on the phased introduction or ramp-up of payments. By the end of the transition period, the level of support should be aligned with that granted to farmers in EU Member States.

4 CAPPING OF SUPPORT

- ✓ **Limitations ("capping") on the amount of support per farm should not be applied to Ukrainian farmers in a way that effectively deprives a significant share of producers of support.** Such approaches make it impossible to compensate for additional costs related to the transition to EU standards and would create structural disproportions for producers who bear the main burden of adaptation.

1 TRANSITION PERIOD



THE TRANSITION PERIOD DURING WHICH UKRAINIAN STANDARDS AND PRODUCTION REQUIREMENTS MUST BE FULLY HARMONISED WITH EU NORMS SHOULD BE AT LEAST 10 YEARS. THIS APPLIES TO:

- ✓ The list of permitted active substances in plant protection products (PPPs);
- ✓ Feed additives;
- ✓ Requirements for the application of manure and nitrogen fertilisers, including in nitrate-vulnerable zones;
- ✓ Establishment of the legal regime for Natura 2000 network areas, land-use restrictions and seasonal/technological limitations;
- ✓ Implementation of GAEC standards: buffer strips, anti-erosion requirements, minimum soil cover, crop rotation, non-productive areas;
- ✓ Handling of animal by-products.

5 ACCESS TO STRUCTURAL FUNDS



- ✓ The transition of Ukrainian farmers to European standards and production requirements will require substantial investment that is unaffordable for many enterprises. Therefore, it is critically important that Ukraine's agricultural sector, following the example of Poland and other countries of past enlargements, **gains access to European financing for the necessary restructuring from EU structural funds.**

6 ACCESS TO THE EU MARKET

- ✓ Ukrainian products that fully comply with EU SPS and production standards and are placed on the markets of EU Member States in accordance with EU requirements on labelling, traceability and certification **should receive fully liberalised access to the EU market.** Products exported to third countries will be produced in accordance with Ukraine's national requirements, fully traceable, and labelled as "non-EU compliant products".

Enlargement – Yes – But ...

Enlargement must **strengthen – not destabilise** – the EU production base



EU producers bear **higher structural costs** while competing with operators not yet fully aligned with the acquis.

This creates:

- **Internal market distortion**
- **Political tension** in Member States
- **Investment uncertainty**



Poultry needs to be recognised as a sensitive sector

- generational renewal,
- reduced reinvestments
- rising import dependence
- ...



What we ask:

1. Accession of Ukraine with Agri-holding model will put EU family farming model under huge pressure: need to **recognise poultry as a sensitive sector**
2. Need for **strong inter-service coordination**
3. Work on **complementarity with EU productions** rather than competing with EU agri production: e.g. protein feed
4. **Help Ukraine to become export-oriented** since it is competitive on world markets

Challenge 3: Animal health

HPAI + ND Outbreaks

(1/10-26/11/2025)

BROILERS & TURKEYS | DISEASES & HEALTH

Newcastle disease persists in Spain and Poland

The disease has hit another flock in each of the European countries.

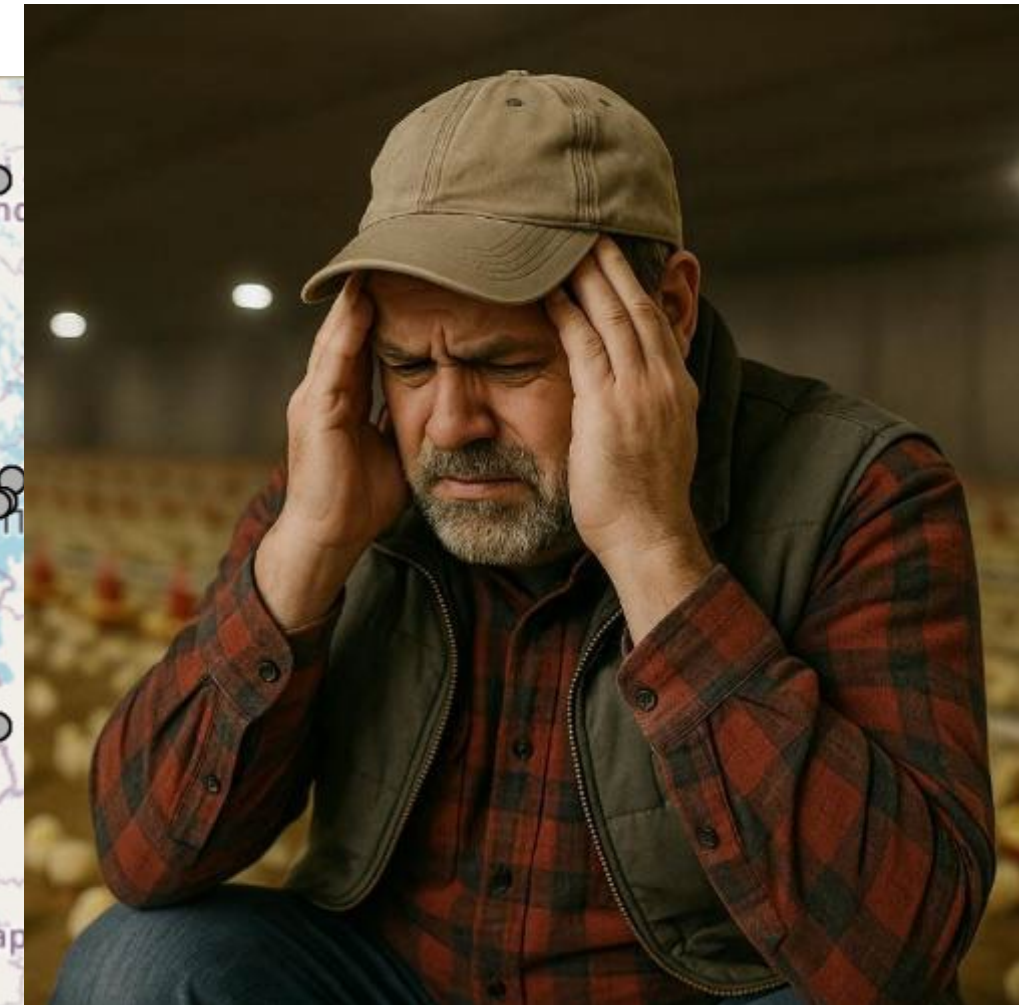
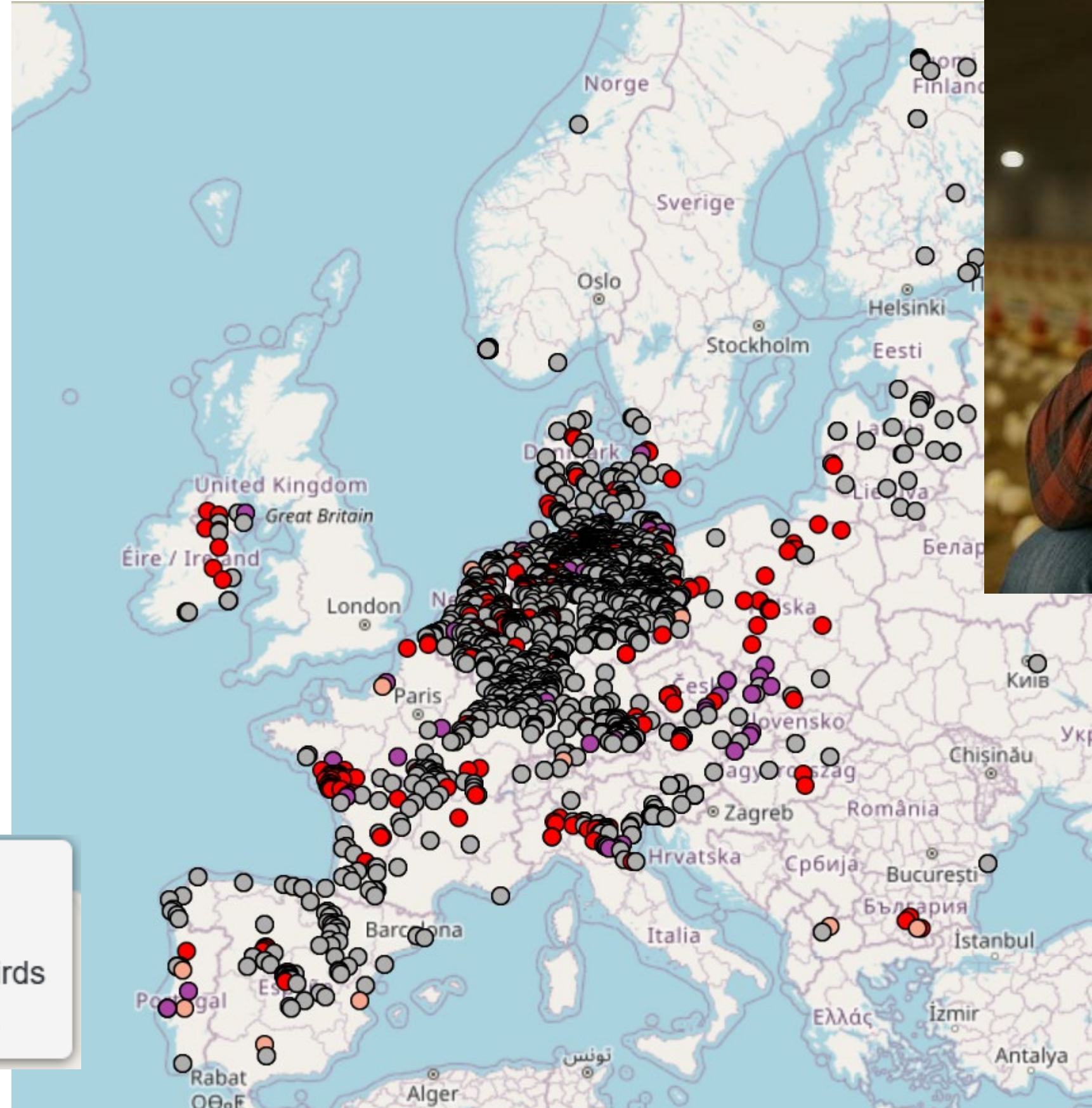
Roy Graber
May 12, 2026



Source: Farm & Food Care

New cases of [Newcastle disease](#) have been confirmed in the countries of Spain and Poland.

- Farms
- Backyard
- Captive birds
- Wild birds



Source: Istituto Zooprofilattico Sperimentale delle Venezie (EU Reference Lab. for HPAI)

Cost **Effectiveness**...

France's vaccination campaign cost an estimated **€105 million** for the 60 million ducks inoculated, compared to the €1.4 billion in losses incurred pre-campaign.



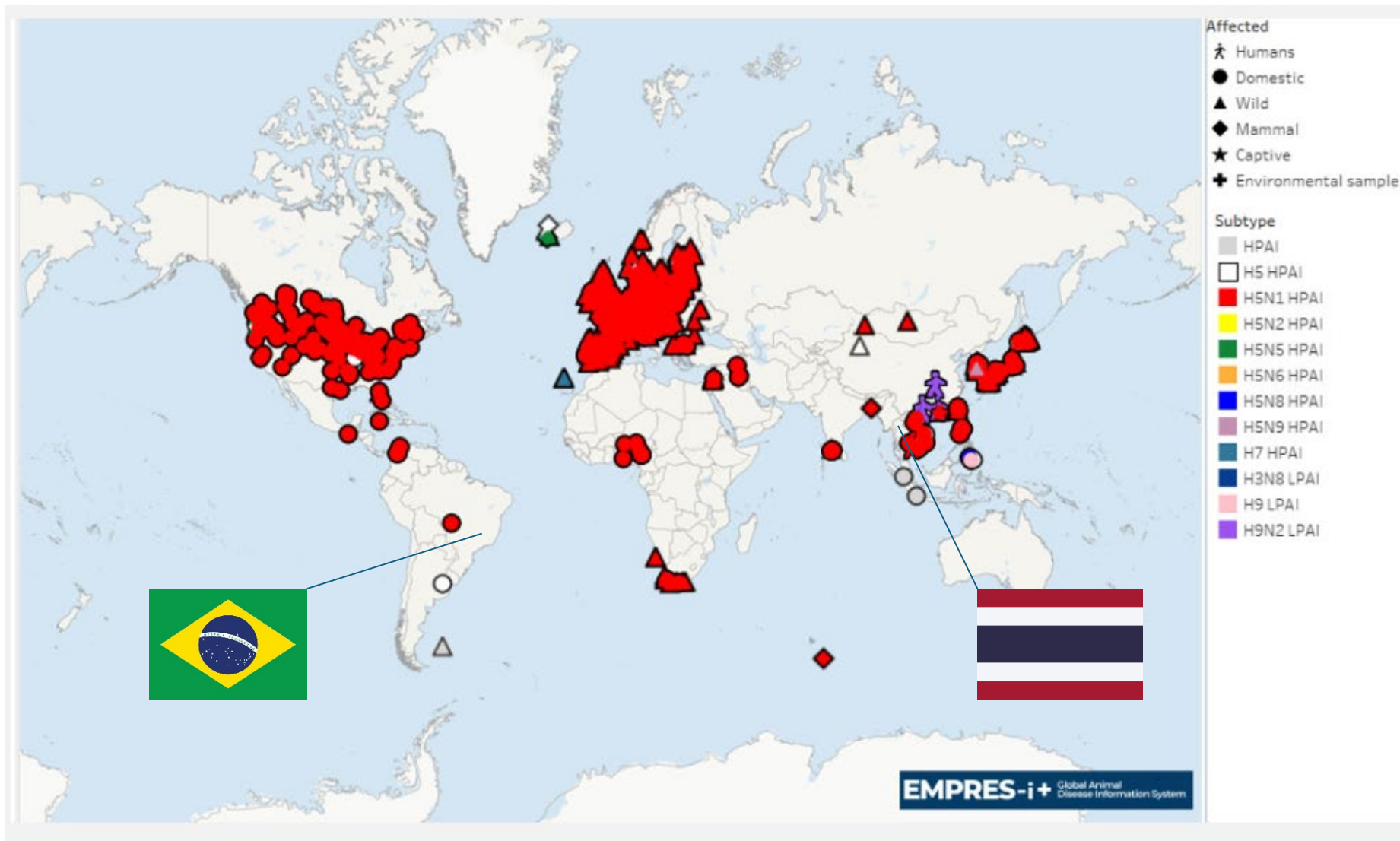
For every €1 spent on vaccination, **€13 was gained for France's economy** through loss of value averted.



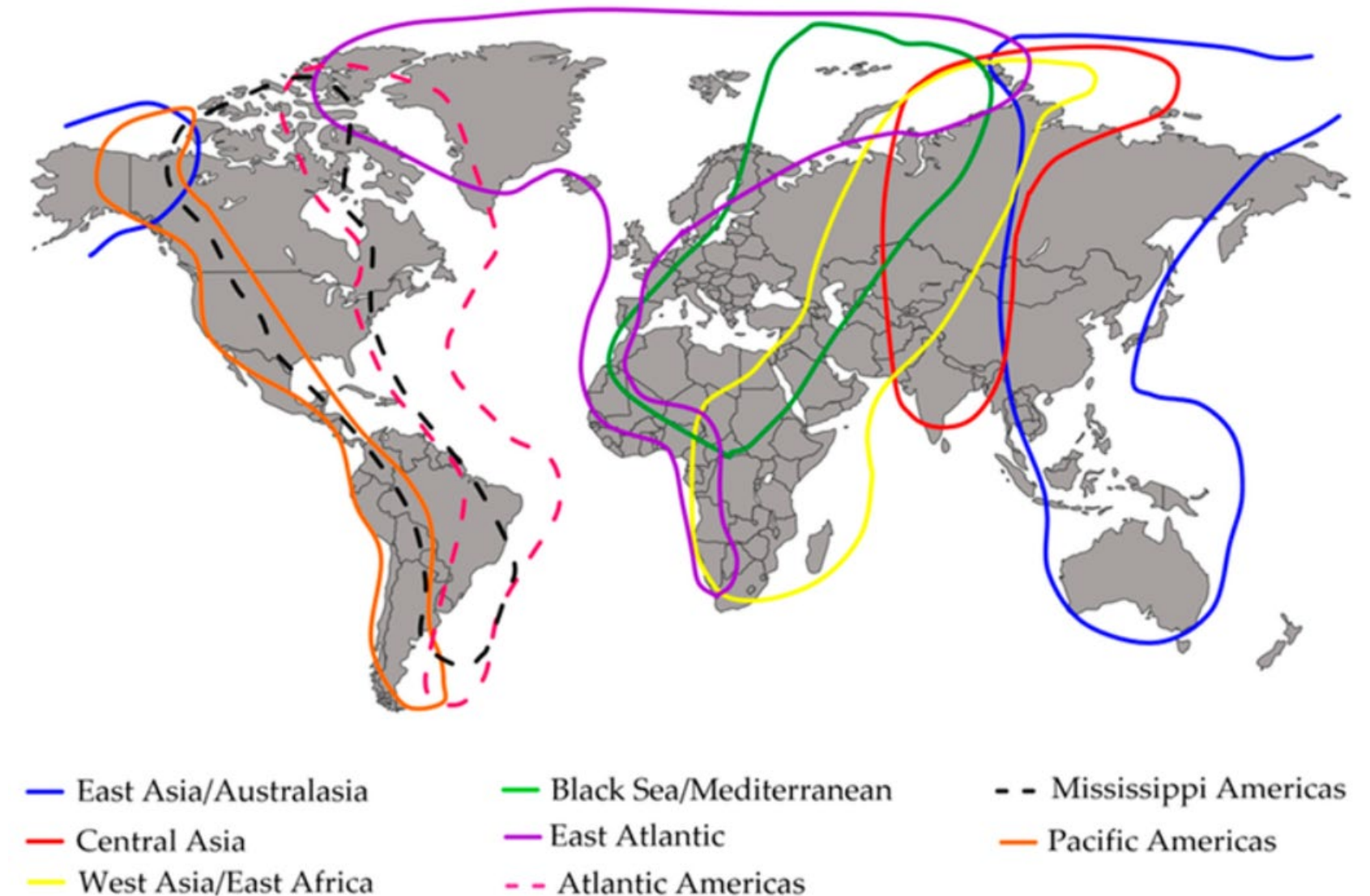
HPAI - A Problem Worldwide

The EU Commission needs to be much more assertive on the countries that are not surveilling and reporting properly.

Global distribution of AIV with zoonotic potential observed 01/10/2025 to 22/01/2026



The migration routes (flyways) of migratory birds all over the world.



Source: [FAO](#)

Western countries are getting penalized for playing 'by the rules'

Exporter	2019	2020	2021	2022	2023	2024	Change 2019–2024	% change
EU-27	2,499	2,346	2,135	1,913	1,828	1,883	-616	-24.7%
USA	3,259	3,376	3,350	3,314	3,302	3,058	-201	-6.2%
Brazil	3,811	3,875	4,226	4,447	4,767	4,900	+1,089	+28.6%
China	428	388	457	532	554	680	+252	+58.9%
Thailand	881	941	907	1,021	1,098	1,150	+269	+30.5%
Argentina	155	155	183	194	144	170	+15	+9.7%
Ukraine	409	428	458	419	428	445	+36	+8.8%

Source: [AVEC Annual Report](#)

HPAI - A Worldwide Problem



HPAI is driven primarily by wild migratory birds – not by EU farming systems.



EU producers bear higher structural costs while competing in global markets that do not apply equivalent rules.



HPAI management must be aligned with competitiveness. It is a strategic autonomy and food-security issue.



Vaccination must be a tool - and if carried out properly (as we do it in the EU) - **it should not create trade bans**



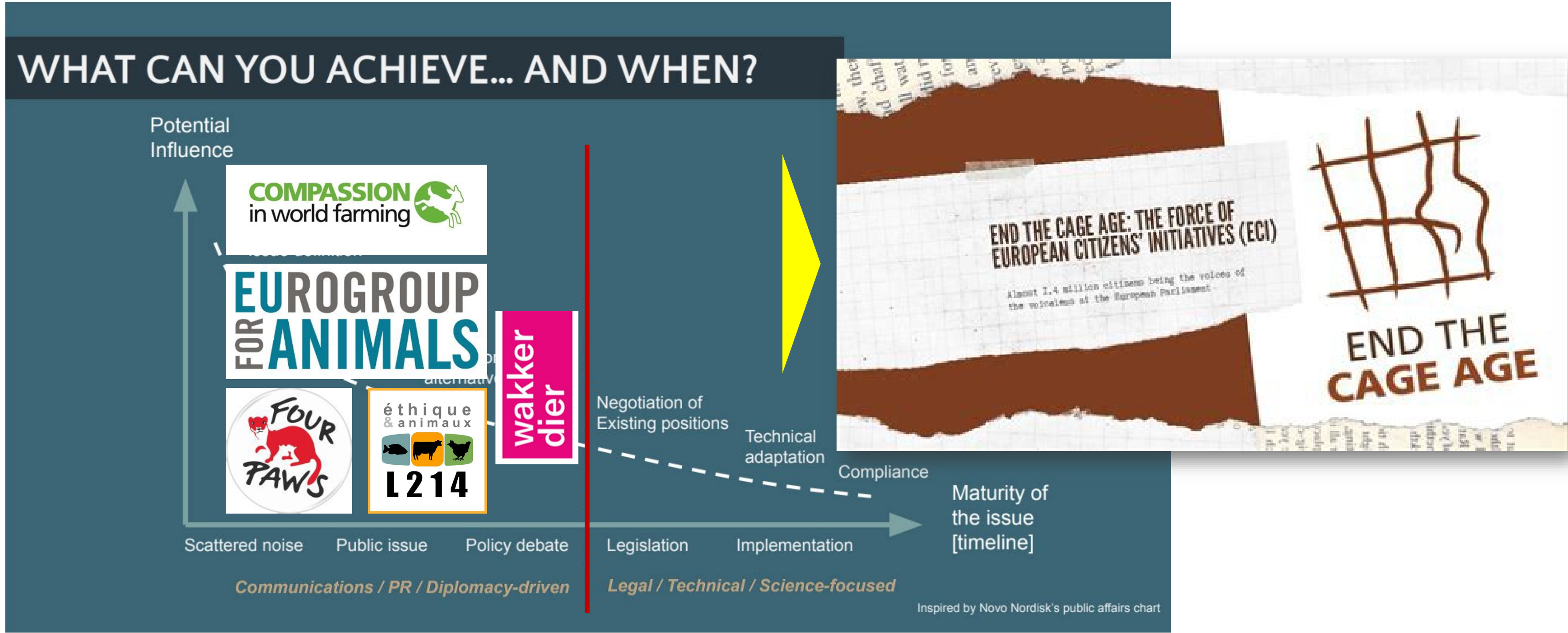
What we ask:

- 1. Assertiveness** towards the countries that are not surveilling and reporting properly
- 2. Encourage prevention** instead of cure (or culling) - both within the EU and Worldwide
- 3. Find the funding** to prevent ... it is a societal problem, not a farmer problem
- 4. Acceptance of vaccination at global level** - no trade bans



Challenge 4: Societal expectations and communication

Strenght of NGOs = Communication and agenda setting



Revision of the **On-Farm AW Legislation**

**SO WE ARE
STARTING
ALL OVER
ONCE AGAIN!**



On-farm animal welfare package - consultations & impact assessment (2025)

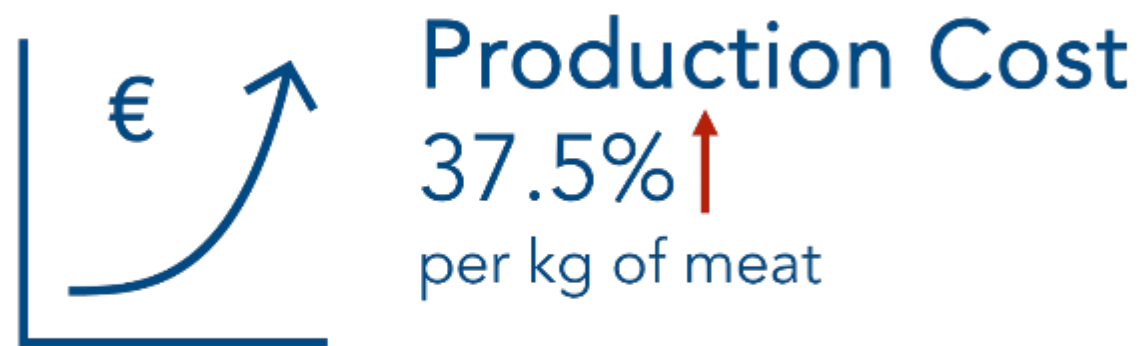
Proposal expected in 2026 on:

1. **Gradual elimination of cages** (laying hens, pigs, calves, pullets, fattening breeders, laying breeders, rabbits, ducks, geese and quail)
2. **Indicators and digitization** (**poultry**, pigs, beef cattle and rabbits)
3. **Import requirements** (**poultry**, pigs, calves and rabbits)
4. **Removal of one-day-old male chicks in the laying hen sector**

Ongoing: revision transport legislation

Costs and Implications of the ECC in the EU

The ADAS report



Poultry Houses
9,692 new
to maintain current
production levels



Water use
35.4% ↑



Meat Production
44 % ↓



Feed use
35.5% ↑



GHG Emissions
24.4% ↑

Sustainable Chicken Forum



- Launched on **19 February**
- Aim to advance chicken welfare while balancing environmental sustainability, carbon reduction and supply pressures.
- **18 brands will step away from the Better Chicken Commitment** to drive the next phase of welfare progress with an approach that helps to answer the challenges facing the poultry supply and hospitality sectors.

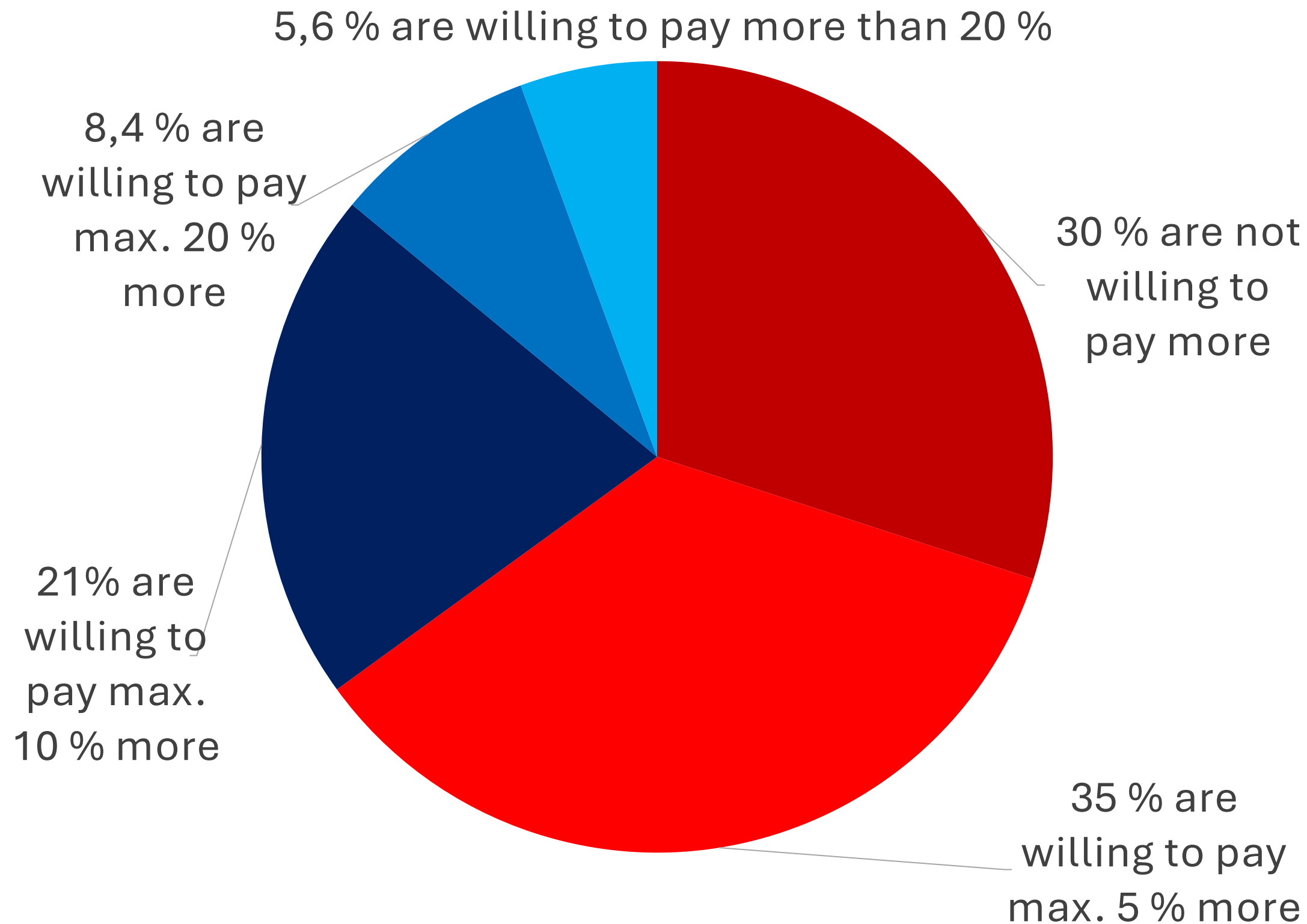


BKUK Group Limited (Burger King UK), Lemon Pepper Holdings (the UK franchisee of Wingstop), Loungers UK Limited (Brightside Roadside Dining, Cosy Club, Lounge Café Bars), Nando's UK & IRE, PLK Chicken UK Ltd (Popeyes), The Big Table Group (Banana Tree, Bella Italia, Las Iguanas, Frankie & Benny's), The Restaurant Group (Bar Burrito, Brunning & Price, wagamama, trgc), Yum! Brands (KFC UK & Ireland, Pizza Hut UK, Taco Bell UK)

- The quantitative claims used in the narrative draw on the RSK ADAS report commissioned by AVEC on the European Chicken Commitment
- Media & public sentiment analysis reports **mostly negative**



Are consumers **willing to pay** for Animal Welfare?



17% have serious difficulties dealing with the **cost** of meat.

Only 14% are willing to pay more than 10% extra for animal welfare.



How to counter negative publicity?

Coefficient Giving

Showing 20 of 554

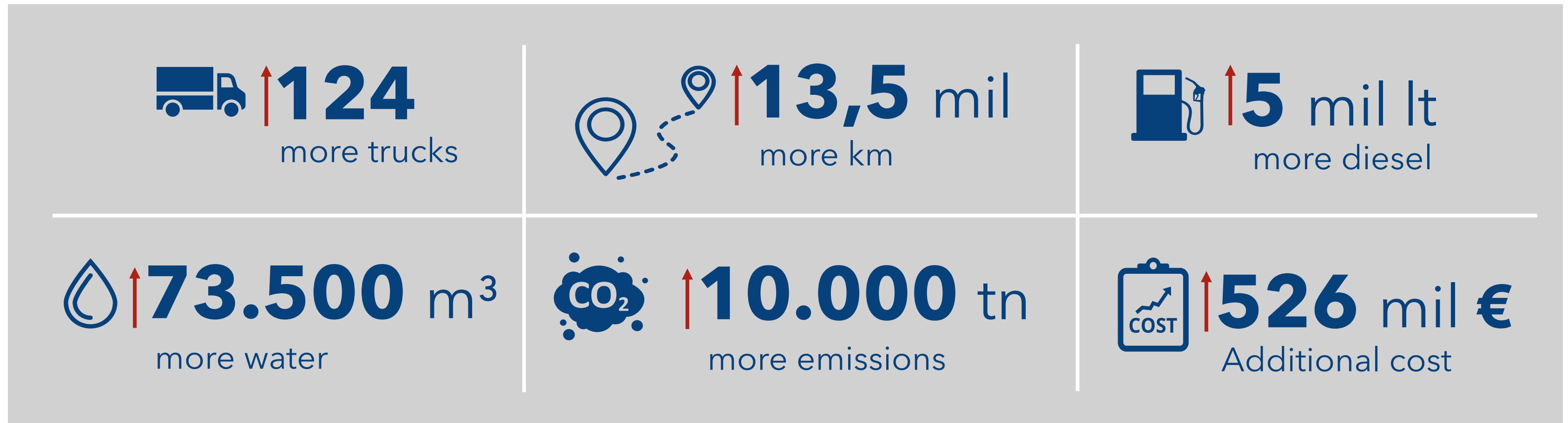
By Date / By Amount

Clear x Amount Year Find a grant

The Humane League	General Support	February 2026	\$10 000 000
Plant Based Foods Association	General Support	January 2026	\$1 750 000
SJS Inc.	Market Shaping for Alternative Proteins	December 2025	\$500 000
Animal Advocacy Africa	Movement Building and Regranting in Africa	December 2025	\$440 000
Eurogroup for Animals	EU Farm Animal Welfare Advocacy	December 2025	\$5 433 518



■ ■ Case Study – Total Impact of the Draft Regulation on the Transport of poultry in France



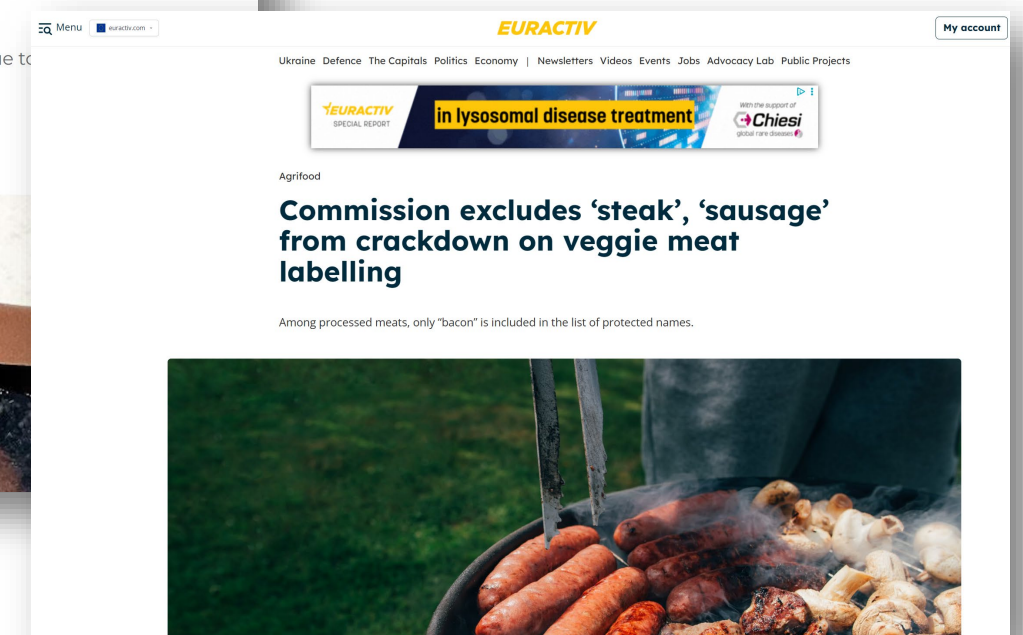
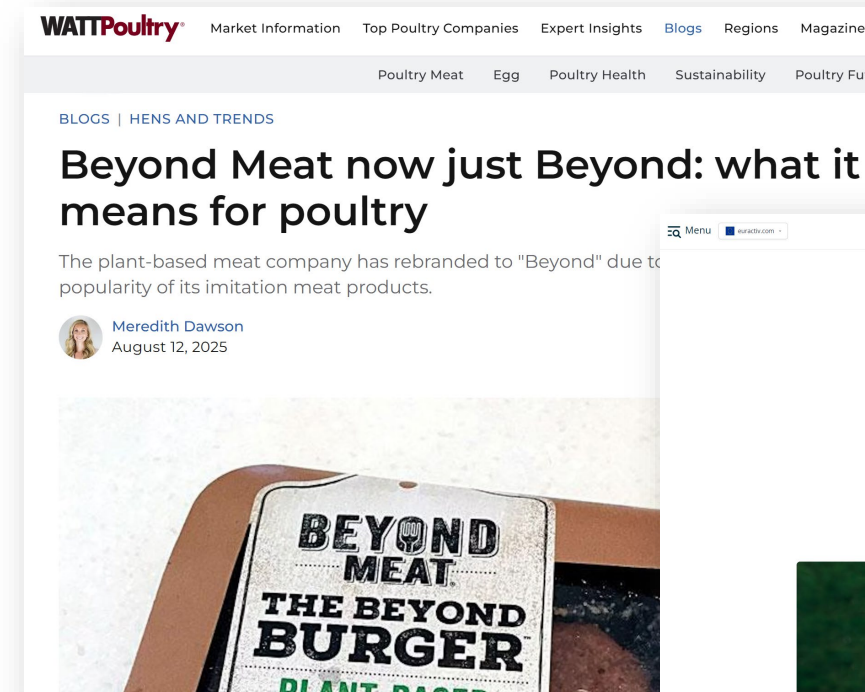
Source: ITAVI. Figures are calculated on an annual basis of production for all poultry species (CHICKEN, TURKEYS, DUCKS, GUINEA FOWLS, QUAILS)

Protecting Meat-related Terms in the EU

In July 2025 the EU Commission proposed to **ban the use of specific meat-related terms on plant-based product labels.**



I join the call for action



Strength in Unity – The **European Livestock Voice**

- Who:** **14 leading EU-based organisations** actively working on livestock and animal husbandry issues.
- What:** A **common EU-focused communication platform** that proactively participates in important livestock debates.
- Where:** Primarily active in the **"European bubble"**, with national partners and/or sister platforms in key EU Member States.
- When:** Launched in **September 2019** following the proliferation of false claims, simplistic narratives and negative communication campaigns.
- Why:** To **counter misinformation with facts and figures** from research or experience in the field.



 www.meatthefacts.eu

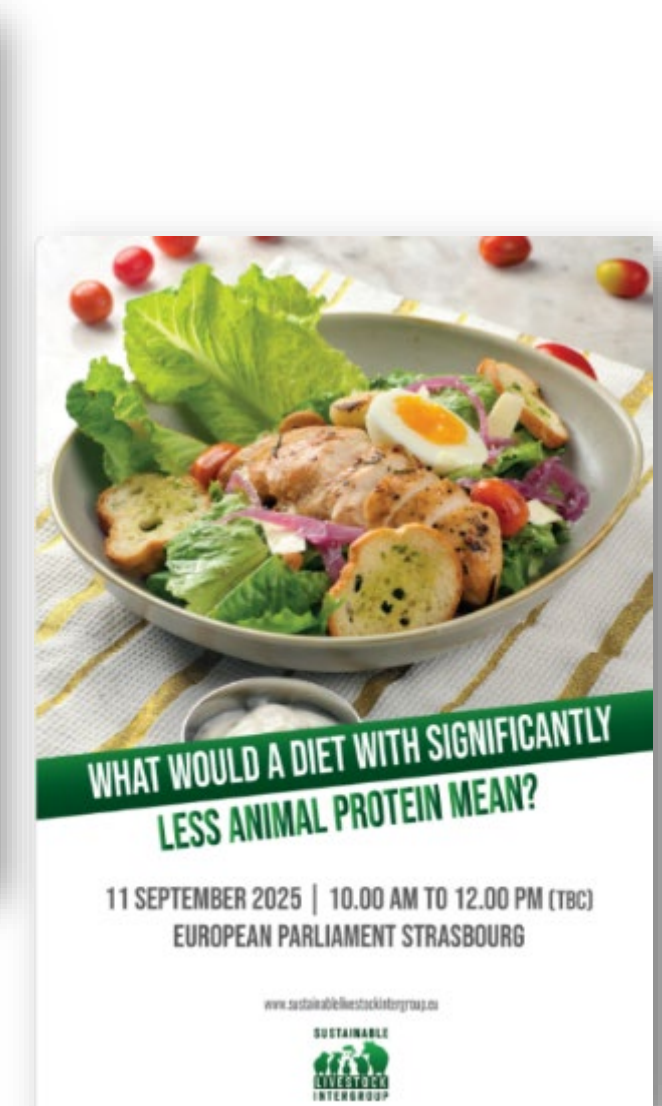
 European-Livestock-Voice

 @LivestockVoice

Sustainable Livestock Intergroup



Live experience of visiting animal transport trucks outside the European Parliament after the first meeting of the Sustainable Livestock Intergroup (March 2025)



OUR RESPONSES TO THESE CHALLENGES

AVEC Manifesto for EU authorities:

Key messages

1

Keeping production in the EU

- Resilient supply chains
- Regional collaboration
- Reciprocity in trade agreements

2

Consumer choice

- Diverse product offerings
- Clear labelling
- Consumer education and awareness

3

Resource Efficiency & Sustainability

- Climate action
- Innovation for efficiency
- Dialogue & accountability

Always Remember

**European
Poultry Meat is
part of the
solution.**

www.avec-poultry.eu

