



EUROPEAN COMMISSION
DIRECTORATE-GENERAL FOR AGRICULTURE AND RURAL DEVELOPMENT

Directorate G. Markets and Observatories

Brussels,

MINUTES

MEETING OF THE "WORKING GROUP ON "Poultry and Eggs" OF THE CIVIL DIALOGUE GROUP ON "ANIMAL PRODUCTS"

Date: 04/05/2018

Chair: Commission, Martin SZENTIVANY, Agneta NORGRÉN, DG AGRI Unit G.3

Present: AT, CZ, DE, DK, ES, FI, FR, HU, IE, IT, PL, UK, Pascual Martinez (observer CELCAA), Dora Pogacsas (additional expert GIRA), Tonci Ukas (observer COPA)

1. Points discussed

1.1. GIRA presentation

The consultant from GIRA delivered a presentation on the perspective poultry producing countries, strategies and threats in the EU.

1.2. Poultry Market Situation

The Commission presented an update on the EU market situation, including poultry meat production forecast based on the data provided by the participants.

Total EU poultry production is expected to increase by 1.2% between 2017 and 2018, driven by a limited rise in the output of broiler meat (+0.7%), turkey meat (+0.4%) and a notable growth in duck meat production (+16.4% albeit from a lower production levels experienced in 2017).

Over the recent months, EU broiler prices have been relatively strong compared to the situation last year, supported by disciplined poultry production growth, combined with a good EU's export performance and lower imports due to less shipments coming from Brazil. The EU trade balance remains largely positive in volume and slightly negative in value.

The wave of the 2016-2017 avian influenza (AI) outbreaks which affected a record number of poultry holdings across 18 EU Member States is now finally coming to an end. AI-related sanitary barriers are gradually being lifted by EU's trade partners, yet some of them still apply country-wide import restrictions on several exporting Member States.

1.3. Eggs Market Situation

The Commission presented an update on the EU market situation, including eggs production forecast, based on the data submitted beforehand by the participants.

The forecast is that egg production will increase by 2.4% between 2017 and 2018. It was further explained that the increase of the production forecast from 2016 to 2017 was due to incorrect number from one Member State.

Market prices had been going down since December 2017, but were still 8.6% higher than the average price for week 17 during 2013-2017. Although high prices in the EU had led to increased import and decreased export, the trade balance remains positive for the egg sector.

As concerns the number of laying hens and the production systems, data was still missing from a major Member State and no final conclusions could be drawn. It appears however as if there will not be any major changes in the number of laying hens in the EU, there appears to be an increase in the number of hens kept in barns while fewer hens are being kept in enriched cages.

1.4. Exchange of views on market trends

The experts highlighted the following main points:

- Concerns on the increasing imports of poultry meat from Ukraine, in particular those under the liberalised tariff line for 'other chicken bone-in cuts' (CN 0207 13 70). The Commission is active in addressing the issue jointly with Ukrainian side under the DCFTA.
- Experts welcome positive results achieved for the EU poultry sector in the recently concluded FTA deal with Mexico, including a full liberalisation of trade in mechanically separated meat and imports of poultry breast/preparations from Mexico limited by a 10 000 t TRQ. They are slightly concerned by a full progressive liberalisation of trade in egg albumins within 10 years.
- Several experts note a gradual expansion in their respective countries of poultry and eggs production in alternative production systems. This trend is driven by consumer demand but also indirectly by a pressure of retail on producers (justifying this by consumer demand).
- The Commission and experts stress importance of providing the most accurate data on production forecast, bearing mind that lack of data from major producing countries may significantly distort the numbers.

1.5. Exchange of views on future work of this working group

The Commission explained that due to rationalisation of resources, working group meetings will be limited to only one full-day meeting per year. However, production forecast data will continue to be collected from the experts and consolidated by the Commission twice per year, in spring and in autumn.

The Commission is committed to improve functioning of the working group to make it more proactive, flexible and relevant. In this respect, experts were invited to reflect on new working methods/topics for the future. The following ideas were mentioned in subsequent discussion:

- Presentations by invited experts on topics of relevance to the working group deliberations. Several topics were identified, such as, regular updates on the situation on world poultry and egg markets, animal health issues having market and trade implications, studies/surveys on international competitiveness, other issues affecting trade in poultry/eggs (e.g. rules on un-stunned slaughter, OIV rules).
- In addition to the regular tour de table, when the experts share their respective production forecasts, several experts could volunteer to make a more detailed presentation on the particular situation in their respective Member State, elaborating on the trends, drivers, challenges and opportunities regarding poultry and egg production, consumption and trade.

2. Conclusions/recommendations/opinions

The Commission reminded experts about high importance of respecting the given deadlines for submission of forecast data in order to be able to process and circulate complete and accurate EU production forecasts well in time before respective meetings.

3. Next meeting

The next meeting is to be held in spring 2019. The exact date will be communicated at a later stage. Experts will be invited to send the filled-in questionnaires in due time.

4. List of participants - Annex

e-signed
Luis CARAZO JIMENEZ
Head of Unit AGRI-G.3

List of participants– Minutes

EXPERT WORKING GROUP ON "POULTRY MEAT AND EGGS"
16/10/217

	MEMBER STATES (ONG)	NAME OF REPRESENTATIVES
1	Czech Republic	MACHANDER VLASTISLAV
2	UK	PATEL AARON
3	UK	DOSSA ANAND
4	Austria	WURZER MICHAEL
5	Hungary	ENDRODI GYORGY
6	Portugal	LIMA PEREIRA MANUEL
7	Germany	BECK MARGIT
8	Spain	FERNANDEZ POZA MARIA
9	Spain	COLLADO ALCALA VICTORIO
10	France	MARINOV CHRISTIAN
11	Denmark	MUNCK LARSEN STIG
12	Italia	GAGLIARDI STEFANO
13	Italia	TRANFA GIOVANNI
14	Poland	DOMINIAK LUKASZ
15	Poland	WENCEK EUGENIUSZ
16	Finland	RANTALA JUKKA
17	Croatia	HODALIC TOMISLAVA
18	Ireland	MALONE ROBERT
19	GIRA	VÉRONIQUE AGUERA
	<i>TOTAL</i>	19

List of participants– Minutes

**WORKING GROUP ON "POULTRY & EGGS" OF THE CIVIL DIALOGUE GROUP
ON "ANIMAL PRODUCTS"**

DATE: 04 05 2018

Name	Surname	MS
WURZER	Michael	AT
Machander	Vlastislav	CZ
BECK	Margit	DE
LARSEN	stig munck	DK
COLLADO ALCALA	Victorio Manuel	ES
RANTALA	Jukka	FI
YANN	NEDELEC	FR
DOSSA	Anand	GB
MARK	WILLIAMS	GB
ENDRODI	Gyorgy	HU
MALONE	Robert	IE
GAGLIARDI	STEFANO	IT
TRANFA	Gianni	IT
ZUBKOW	Anna	PL
MARTINEZ	Pascual	Observer CELCAA
Pogacsas	Dora	Additional expert GIRA
Ukas	Tonci	Observer COPA