
Poultry products Market :

Food safety

and

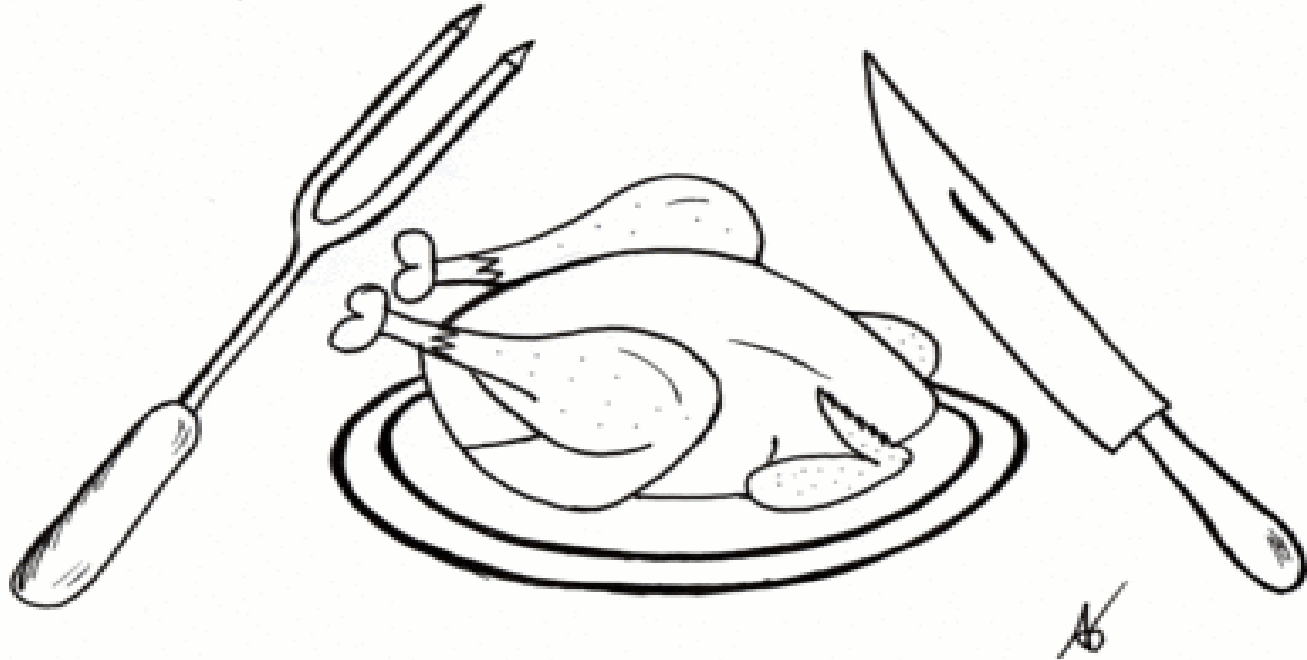
International trade



-
- Poultry on world market
 - World meat market : an overview - 2008
 - World poultry meat market
 - European poultry market
 - Food quality, safety problems and their effects on trade
 - European food safety law
 - Objectives
 - Institutional aspects
 - The general food law
 - European import conditions
 - Principles
 - Importation of poultry products in the European Union
-

Poultry on World Markets

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**Uncertain sanitary situations (avian flu, Newcastle disease)
jeopardize international trade**

**Poultry on
world
market**

World meat
market

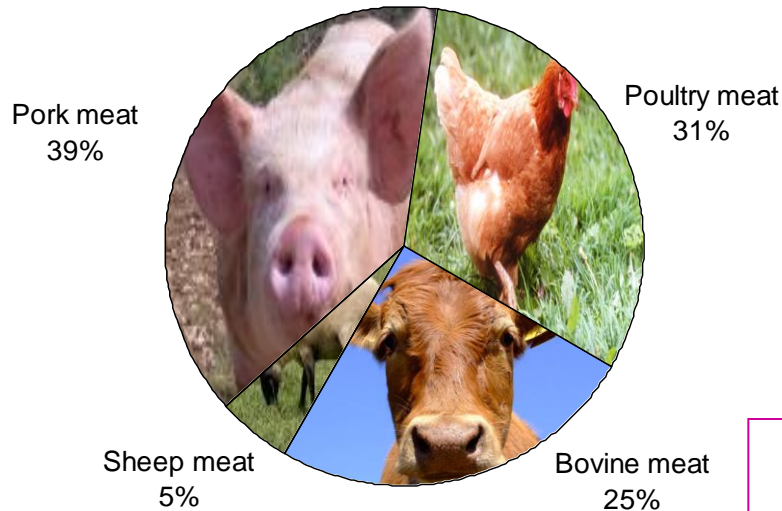
World
poultry
market

European
poultry
market

Food quality, safety problems
and their effects on trade

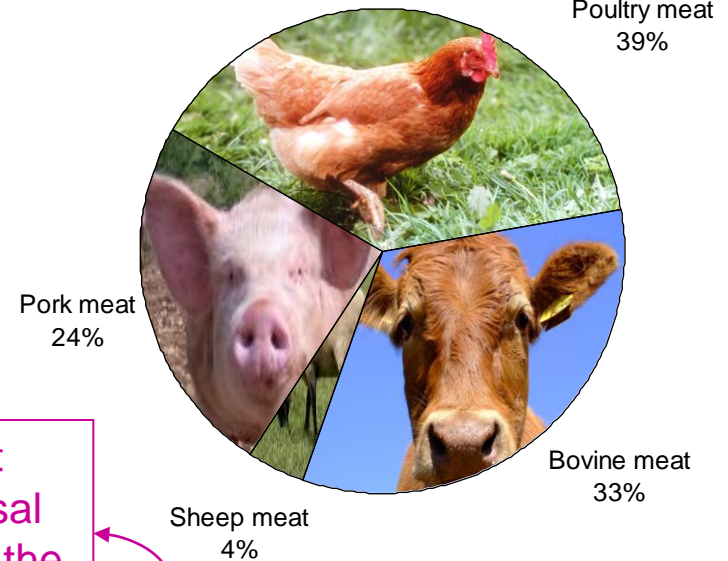
World meat market : an overview - 2008

Worldwide Meat Production
(278 millions tons)



1. Pork Meat
2. Poultry Meat

Worldwide Meat Trade
(21 millions tons)



1. Poultry Meat
2. Bovine Meat

Most
universal
meat in the
world

Sanitary alerts



Global Meat Exchanges = 8 % of global meat production

10 % poultry

10 % beef

6 % sheep

4 % pork

Poultry on
world
market

World meat
market

World
poultry
market

European
poultry
market

Food quality, safety problems
and their effects on trade

In 2006 :

- Avian flu crisis
 - Drop of demand for poultry

→ Global decline of meat prices – 6%

In 2007 :

- Global increase of
 - Meat trade : + 2%
 - Meat prices : + 10 %

BUT :




- Raw materials
- Maize, wheat, soya
- Milk Products

Prices ↗↗

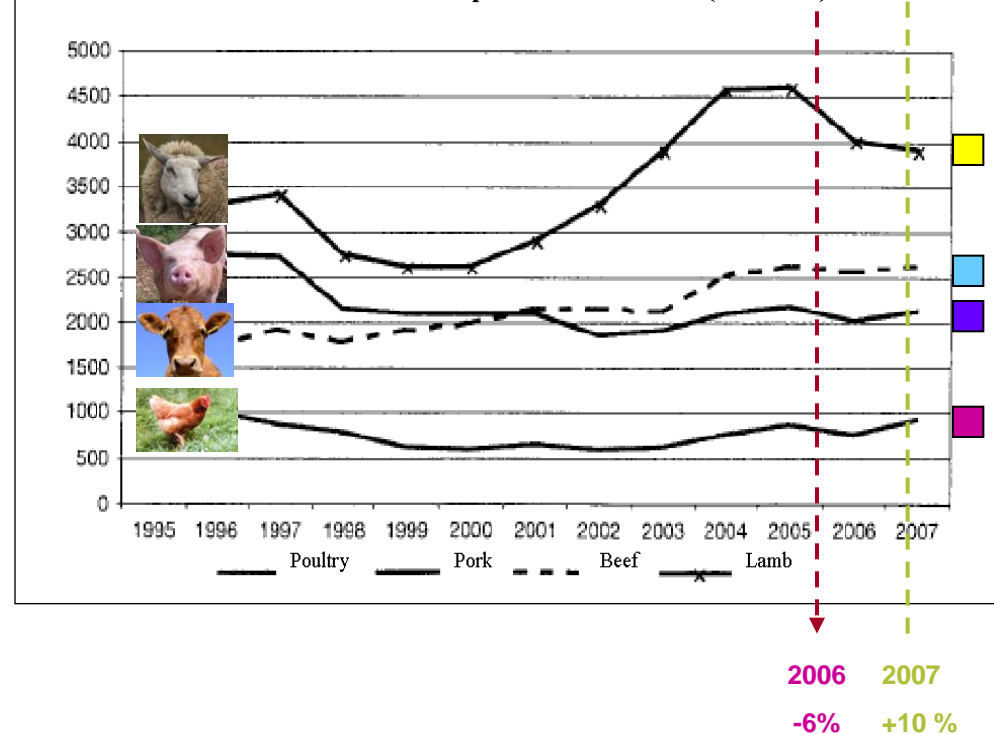
Feed Costs ↗↗ : + 35 %

Marine freight Costs ↗↗ : + 50 %

BUT ↓

- Pork meat and beef value ≈ 
- **Poultry value : + 25 %** 
- Sheep meat value : ↘ 

Evolution of meat prices in the world (US \$/ton)



Partial transposition of rise in costs-of-production on the final product

Poultry on world market

World meat market

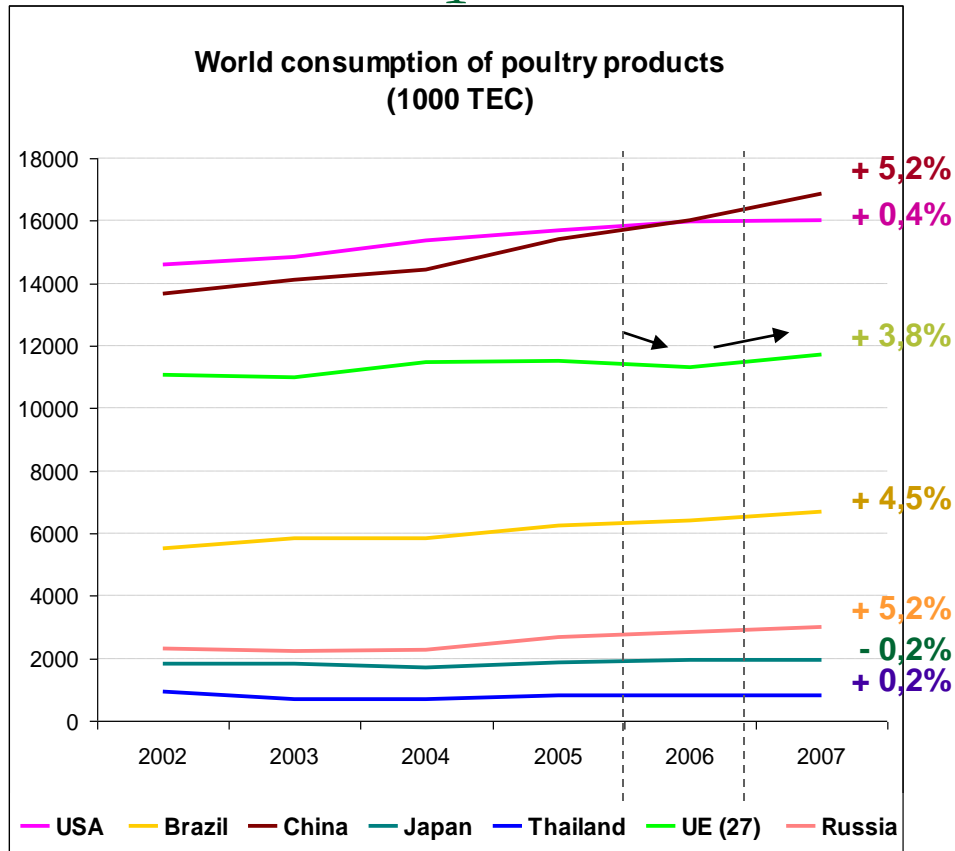
World poultry market

European poultry market

Food quality, safety problems and their effects on trade

World poultry meat market

World Consumption



- Slowing of demand growth in 2006 (*avian flu*)
- Recovery in 2007
- Consumers' psychosis disappeared
- Demand ↗

The Chinese Situation:

- Pork meat = 65% of the total Chinese meat consumption
- 60% animal feed prices increase
- sanitary alert : *Swine infertility respiratory syndrome* (*Blue-ear disease*)

Substitution of chicken for pork
→ World Demand ↗↗

TEC : tons carcass equivalent

Poultry on
world
market

World meat
market

World
poultry
market

Europe
n poultry
market

Food quality, safety problems
and their effects on trade

International trade

International poultry meat trade recovered in 2007 !

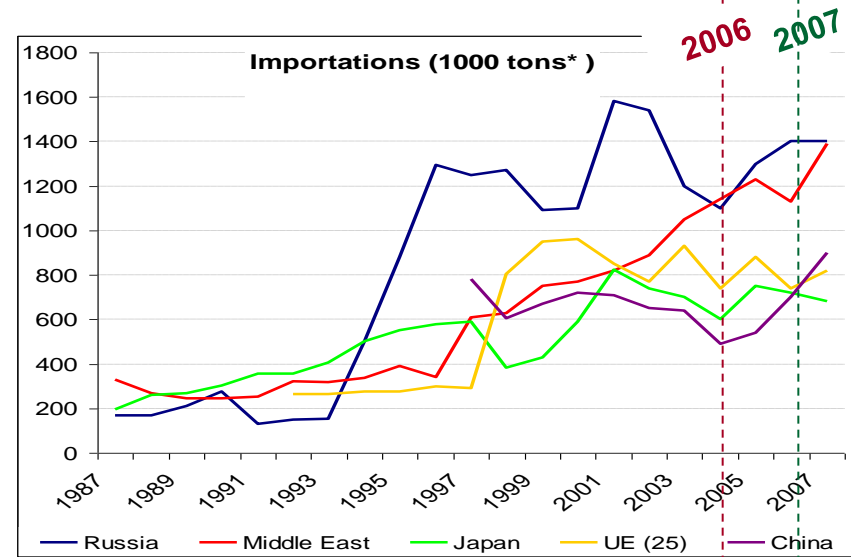
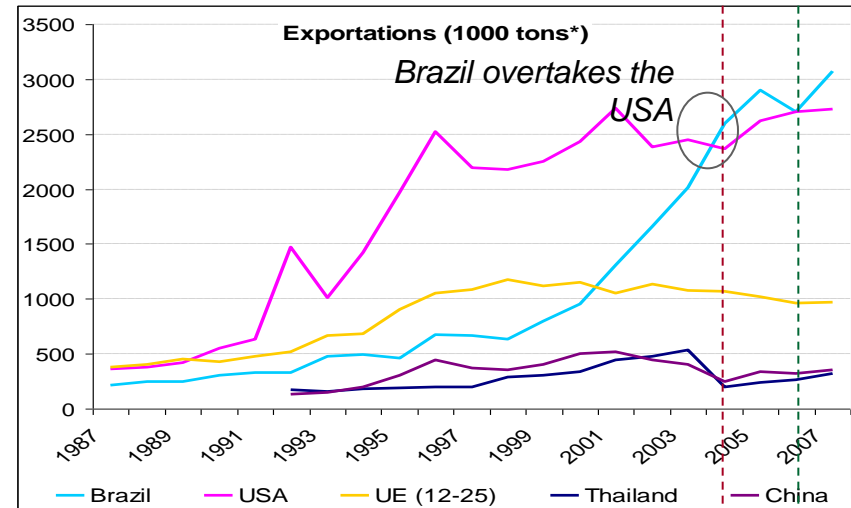


Principal exporters

| | 10 ⁶ tons | Δ06 -07 |
|-------------|----------------------|---------|
| 1. Brazil | 3 070 | + 14% |
| 2. USA | 2 730 | + 1% |
| 3. UE (25) | 970 | + 1% |
| 4. Thailand | 320 | + 23% |
| 5. China | 350 | + 9% |

Principal importers

| | 10 ⁶ tons | Δ06 -07 |
|-------------|----------------------|---------|
| Russia | 1400 | + 0% |
| Middle East | 1130 | + 23% |
| Japan | 720 | - 6% |
| UE (25) | 740 | + 10% |
| China | 700 | + 29% |



* ready-to-cook meat equivalent

Poultry on
world
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Food quality, safety problems
and their effects on trade

World Production

A spectacular rise in spite of the persistence of the avian flu

2006 : Avian flu crisis

→ Global average growth rate : 1 %

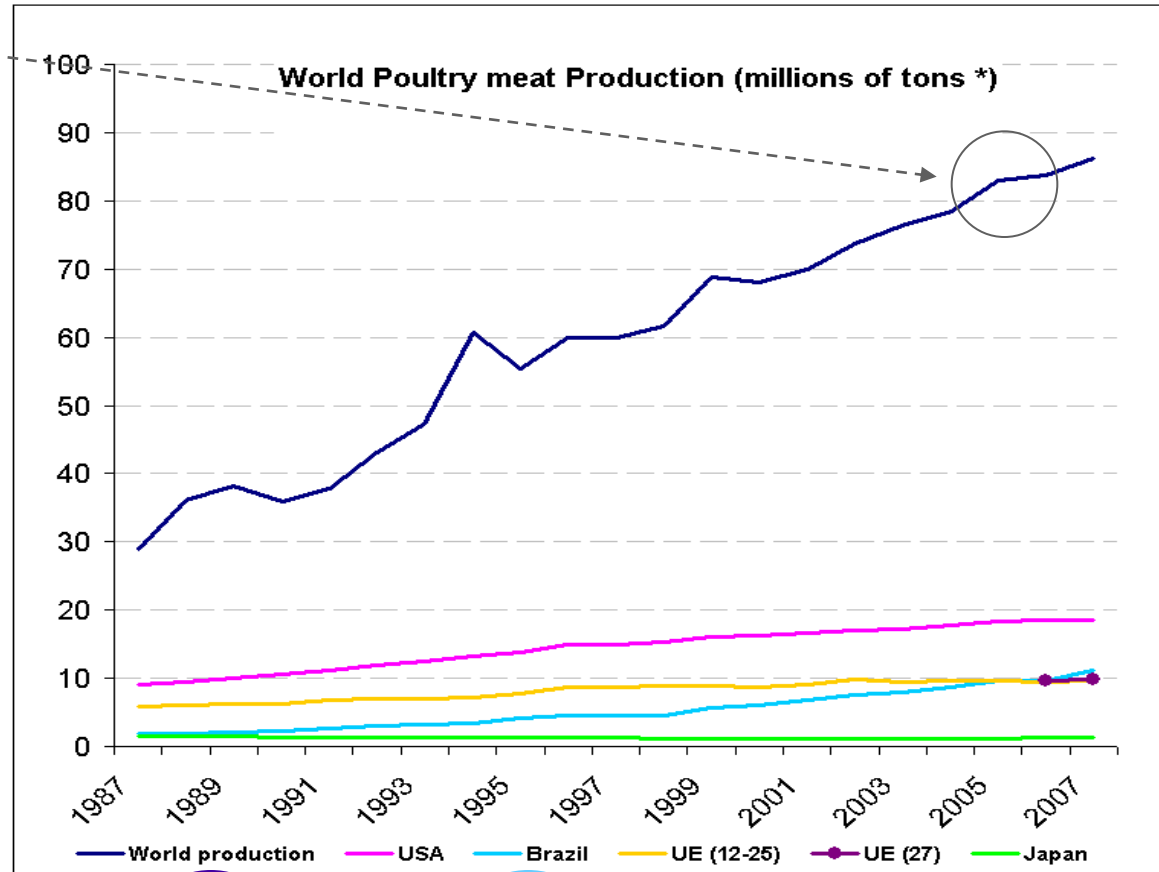
2007 :

→ **End of embargoes**
(avian flu + Newcastle disease)
→ International trade ↗
Global average growth rate : 3 %

Brazil

→ Abundance of animal feed, while feed costs ↗↗ on the international trade market

Average Brazilian growth rate : 15%



Average growth rate 2006-2007

3 %

0 %

15 %

3 %

3 %

1 %

** ready-to-cook meat equivalent*

Poultry on world market

World meat market

World poultry market

European poultry market

Food quality, safety problems and their effects on trade

European poultry meat market

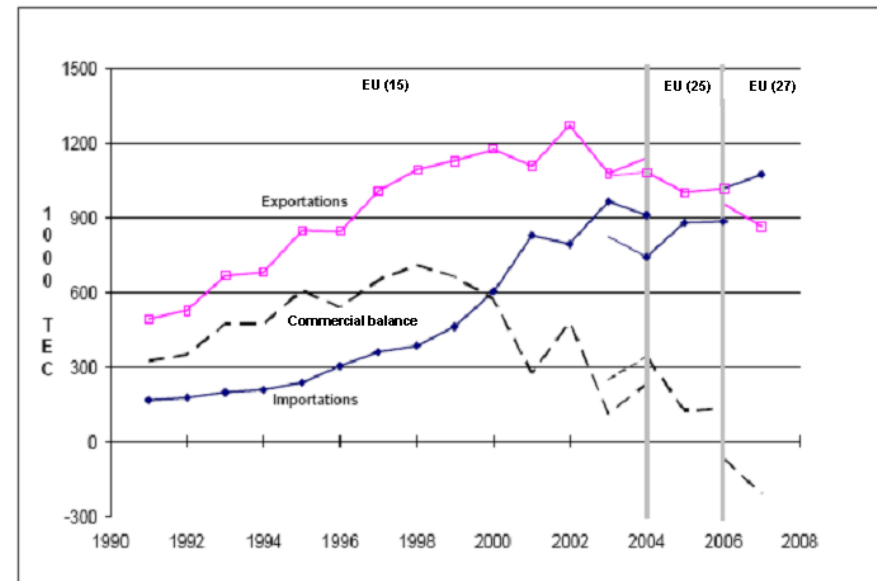
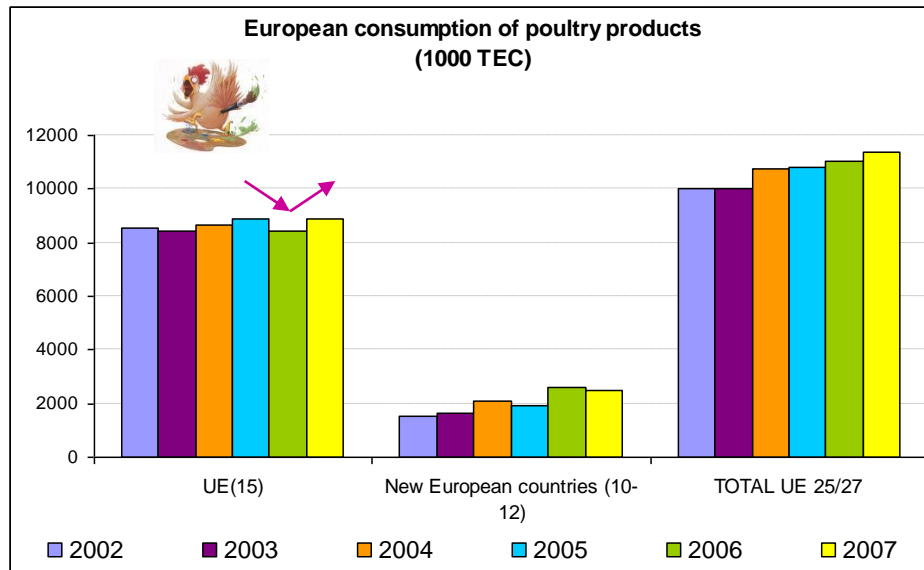
■ Evolution of demand

- ❑ Drop of demand in Europe (15) in 2006
- ❑ Recovery of the market in 2007

■ Evolution of commercial balance

- ❑ Drop of exportations since 2004 (sanitary alerts)
- ❑ Importations overtook exportations in 2007

→ Embargo on european poultry products → exportations ↘



Source : Office de l'Elevage d'après Douanes et Eurostat

TEC : tons carcass equivalent

Poultry on world market

World meat market

World poultry market

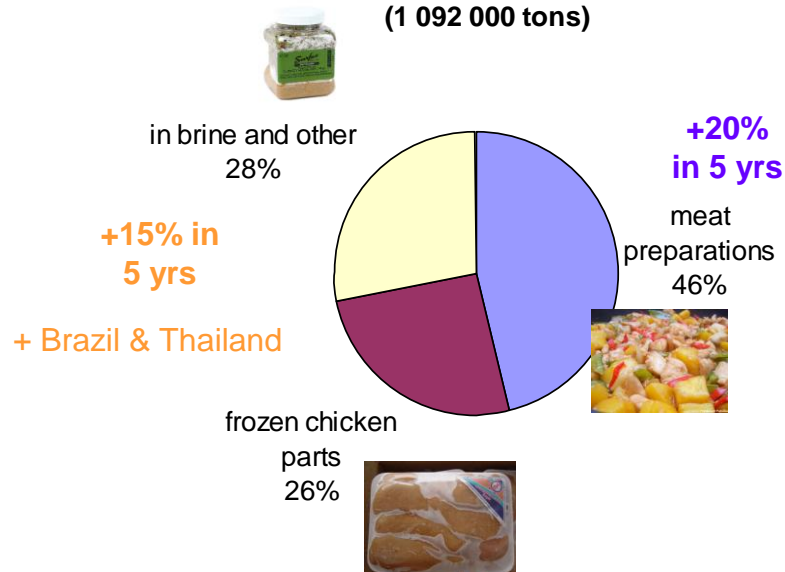
Europe and poultry

Food quality, safety problems and their effects on trade

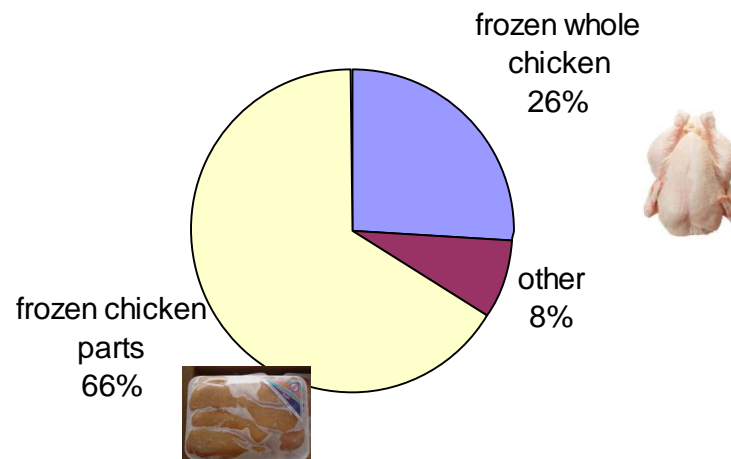
■ European trade of poultry products structure : *Rapid evolution*

- ❑ Trade of preparations ↗
- ❑ Trade of raw meat ↘

European importations structure for poultry meat in 2007
(1 092 000 tons)



European importations structure for poultry meat in 2007
(1 092 000 tons)



**Poultry on
world
market**

World meat
market

World
poultry
market

**Europe
an
poultry**

Food quality, safety problems
and their effects on trade

Food quality, safety problems and their effects on trade



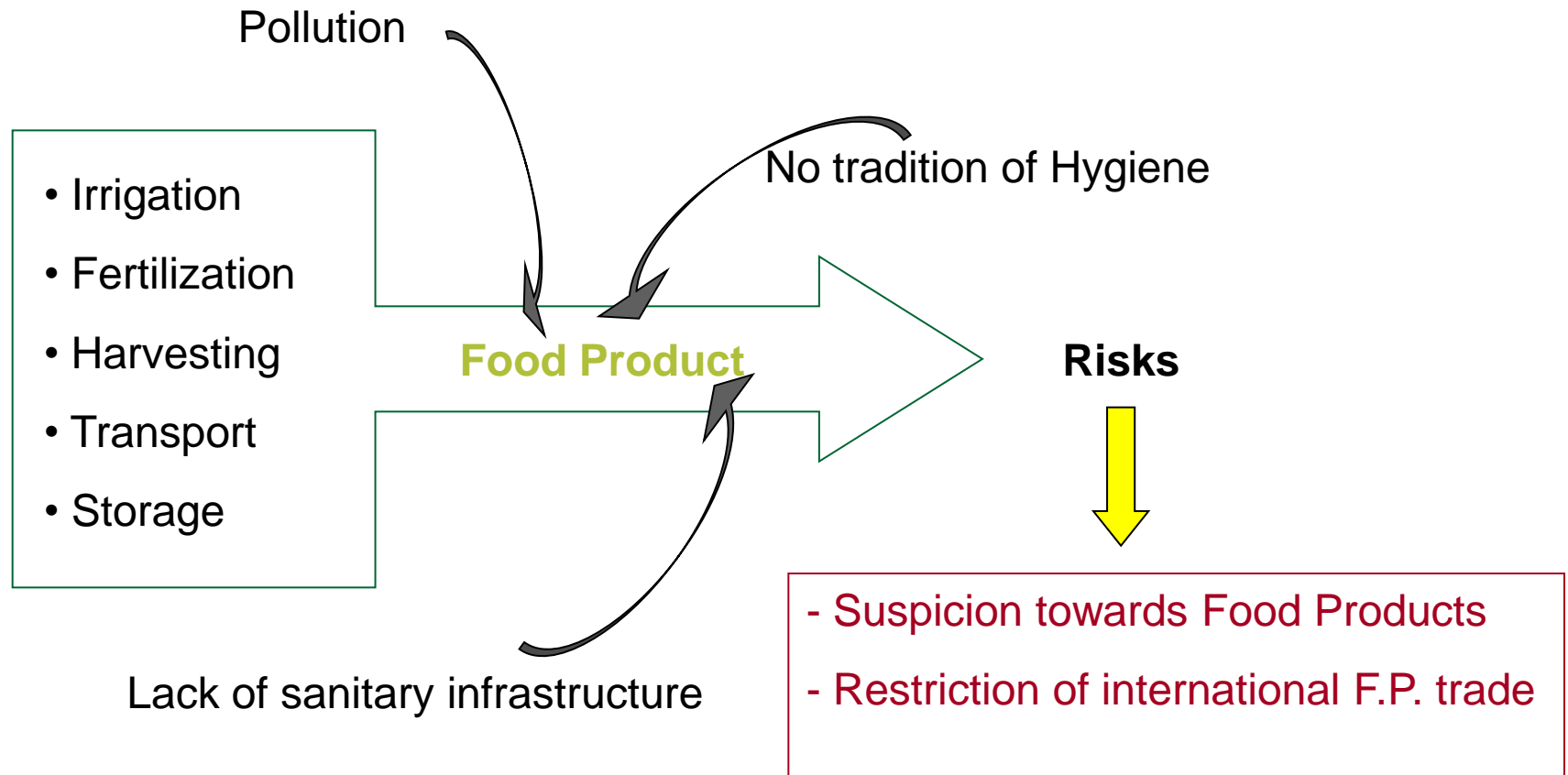
Poultry on world
market

**Food quality, safety
problems and their
effects on trade**

European
food safety
law

European
import
conditions

Food quality, safety problems and their effects on trade



Reinforcement of the control of food safety at all stages of the production chain in each country



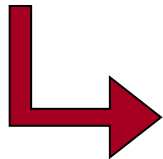
Food safety law in the European Union

Objectives : **Consumer's protection.**

Food Safety :

state where food contains no hazard that may harm the health of the consumers in a short-term or a long-term perspective

- Science :
→ chemistry, biology, agronomy, medicine, veterinary medicine, ...
- Policy
→ legislation, crisis management plan, predictive measures, ...

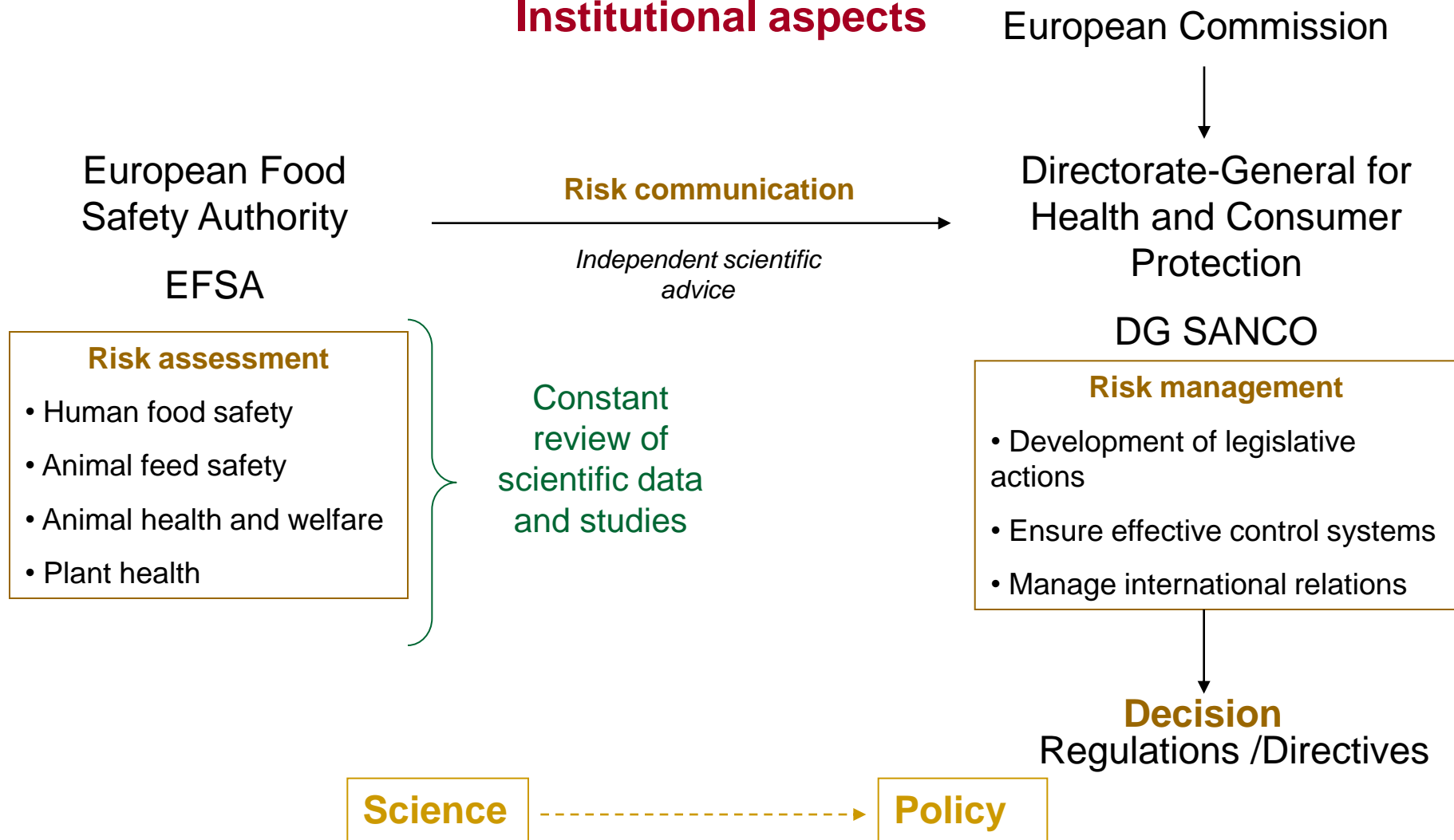


Top priority of the European Commission



Food safety law in the European Union

Institutional aspects



Poultry on world market

Food quality, safety problems and their effects on trade

European food safety law

Objectives

Institutional aspects

The general food law

European import conditions

Principles

Importation of poultry



Food safety law in the European Union

The General Food Law

Assurance of a high level of protection of human health

From Farm to Fork !

Consideration of **all stages** of the **food** and the **animal feed** production chain



production



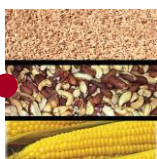
transformation



distribution



consumption



New emphasis on
Animal feed!!!

= Consequence of
the Mad Cow Disease

Responsibilities are **common to all stages** of production and distribution !

+ Hygiene during transport !

Poultry on world
market

Food quality, safety
problems and their
effects on trade

European
food
safety law

Objectives

Institutional
aspects

The
gener
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food

European
import
condition
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Principles

Importation of
poultry



Food safety law in the European Union

The General Food law :

General principles :

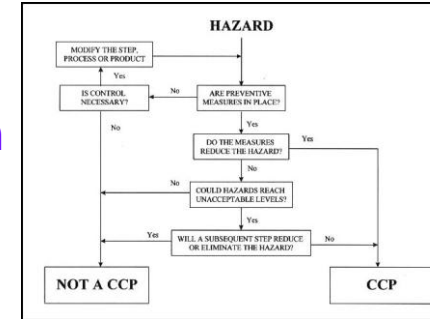
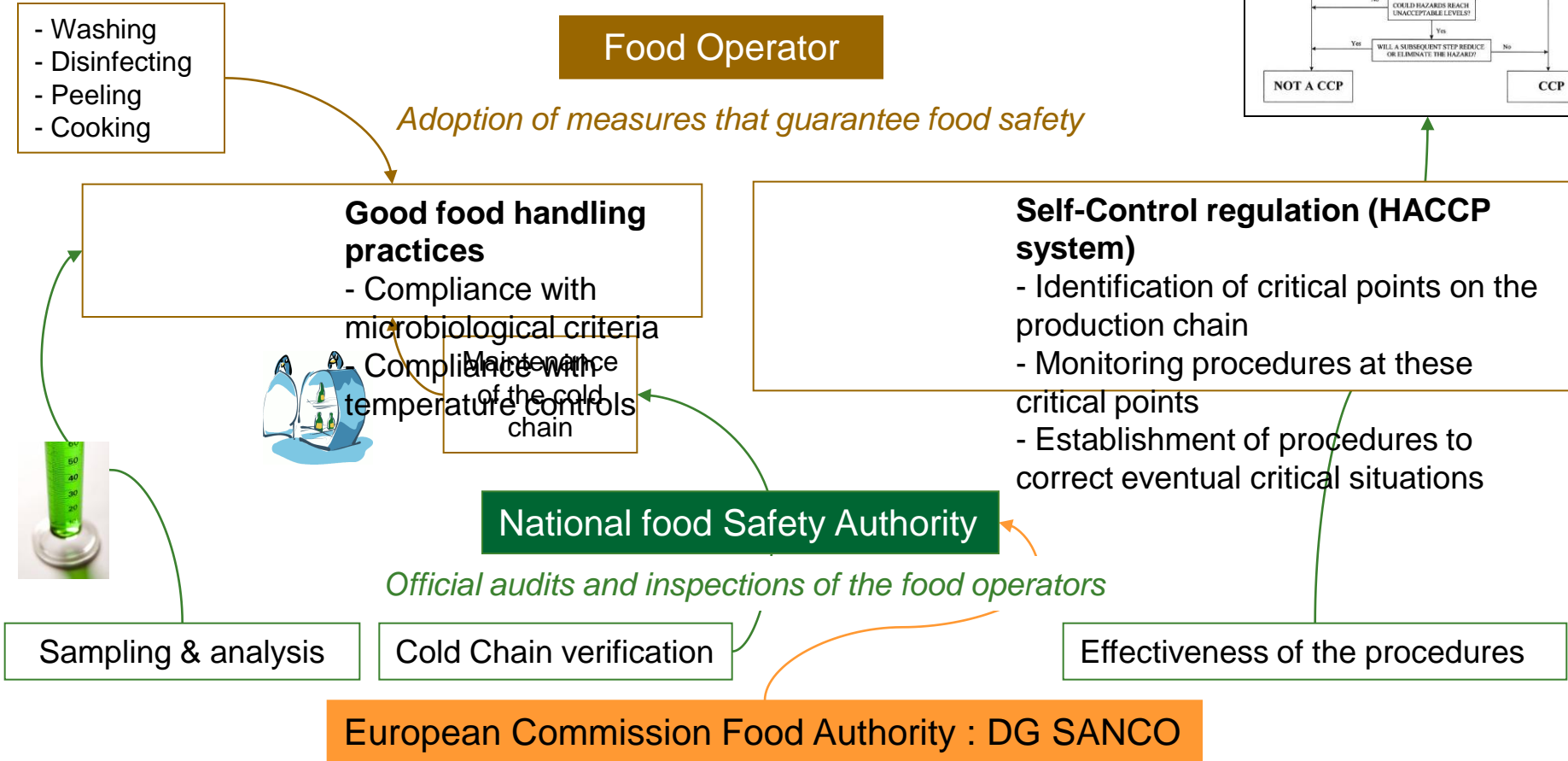
- **Responsibilities and Regulation system**
- **Traceability**
- **Precautionary principle**
- **Rapid Alert System**
- ...



Food safety law in the European Union

The General Food law :

General principles : Responsibilities and Regulation System



Verification of the effectiveness and the control capacity of the State Members' Food Authority

| | | | | | | | | |
|-------------------------|--|--------------------------|------------|-----------------------|------------------|----------------------------|------------|------------------------|
| Poultry on world market | Food quality, safety problems and their effects on trade | European food safety law | Objectives | Institutional aspects | The general food | European import conditions | Principles | Importation of poultry |
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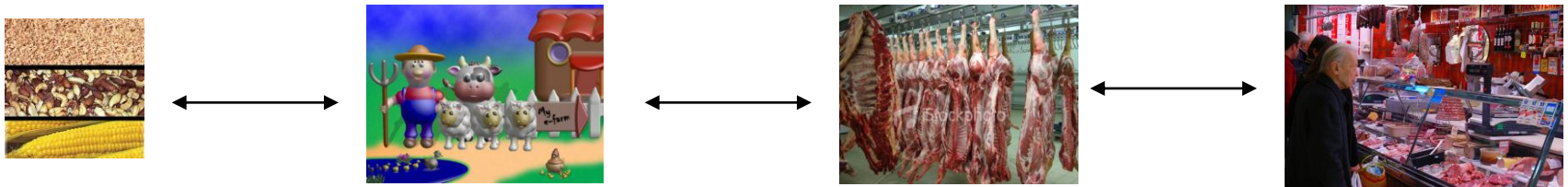


Food safety law in the European Union

The General Food law :

General principles : Traceability

An original European Food Handling system



Constraints on every food business operator :

Identify their sources and customers

→ **Records** of where their food material originated and where it went

One step up and one step down the food chain

→ **Identification methods and labelling** of food or feed



Food safety law in the European Union

The General Food law :

General principles : Precautionary principle

Used when the possibility of harmful effects on health is identified but scientific uncertainty persists



→ Adoption of health protection measures

Proportional

to the desired level of protection

Non-discriminator

comparable situations should not be treated differently

Cost-effective

The costs of action must be greater than the costs of non-action

Temporary

Review within a reasonable period of time

↓ Linked to

Measures

- Public information about adverse effects
- Funding new research programs
- Use interdiction of certain products or practices
- Sale interdiction of certain foodstuff

→ *the nature of the risk*

→ *the development of scientific knowledge*

- Clarification of the scientific uncertainty
- Review of the risk assesment

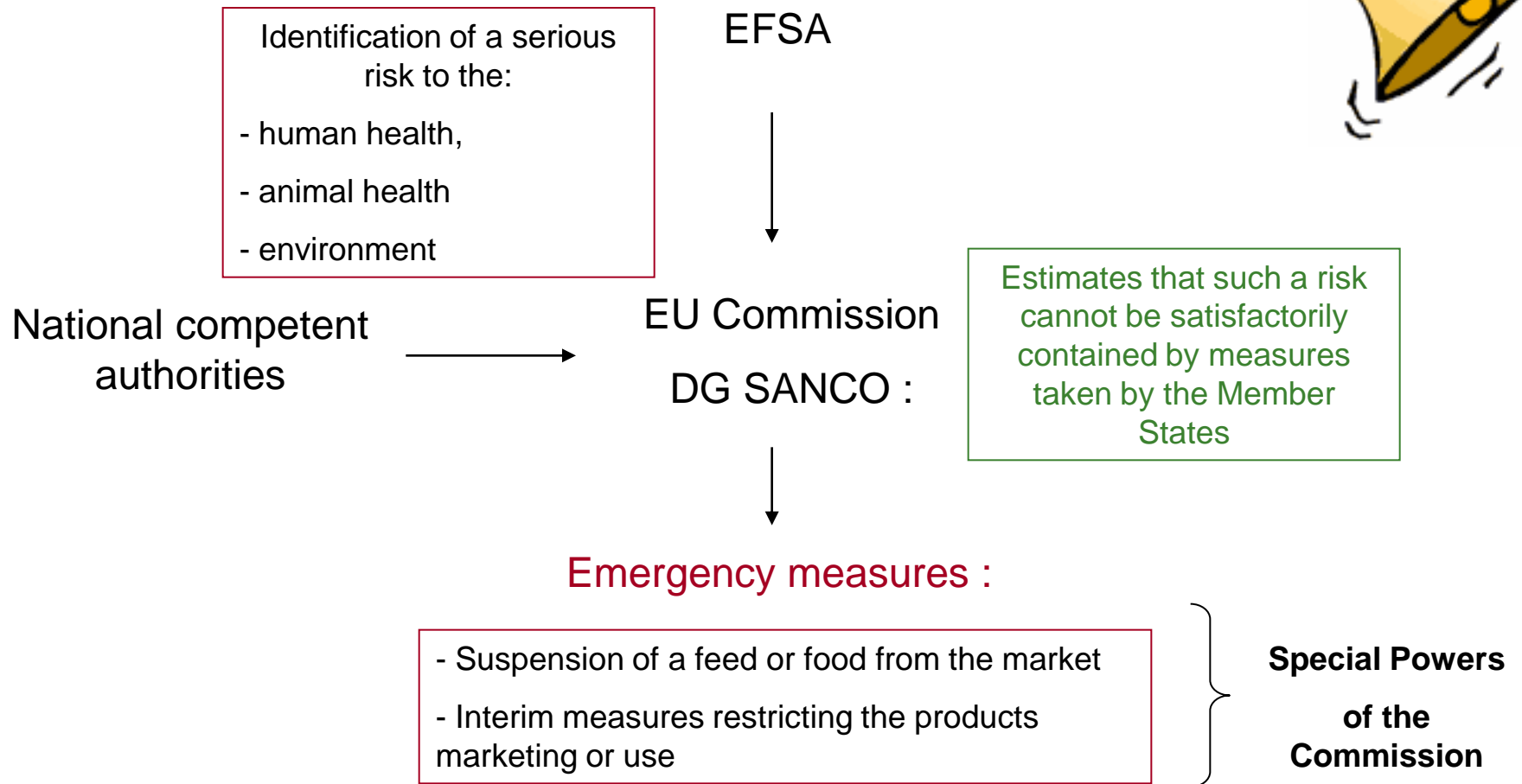
| GM's | Irradiation of meat | Beef spinal cord | Veterinary drugs | | Pesticides | | | |
|-------------------------|---|---------------------------------|------------------|-----------------------|-------------------------|----------------------------|------------|------------------------|
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Food safety law in the European Union

The General Food law :

General principles : The Rapid Alert System





Food safety law in the European Union

The General Food law :

General principles : And also ...

- Respect of animal welfare and environment
- Contribution to a fair trade
- Protection of consumer's interests

Prevention of :

- fraudulent practices
- adulteration of food
- any practices which may mislead the consumer

• ...



European import conditions

Principles

*Obligation for the imported products to **fulfil the same high standards** as products from the UE Member States*

EU = the world's largest importer of food

Importations from over 200 countries

Harmonization of import rules in all EU countries



European import conditions

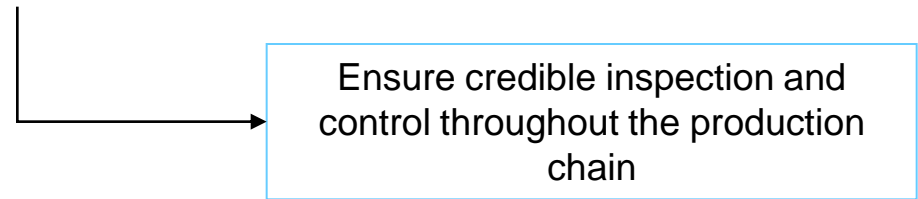
Principles

Food safety begins in farm, wherever the food comes from

→ Organisation of inspection missions in the exporting country

→ *Inspection of the food safety authority*

→ Recognition of the **competent authority** of the non-EU country



Which covers all relevant aspects of

- Hygiene
- Consumer Safety
- Animal health Status

→ **Official European Certification**

of the third country's products



European import conditions

Principles

Other European importation policies

→ Fair solution

- Participation with other countries on drawing up adequate international food safety rules

→ Same high level standards worldwide

→ Easier exportations to the EU

-food safety
-environmental protection
-rural development
-sustainable production
-animal welfare.

- Supply of technical assistance to help developing countries to meet its own standards

Reduction of the number of deaths from contaminated food and water

- Campaigns for 'fair trade' products

foodstuffs from producers who have been paid a fair price and which have been handled and processed by workers who receive fair treatment.



European import conditions

Importation of poultry products in the European Union

Requirement for European official authorisation

- ❑ European recognition of the third country's competent authority
 - Insurance of effective enforcement of all necessary health and hygiene controls
 - Efficiency of laboratories to diagnose diseases

Inspected on the spot by the Commission's Food and Veterinary Office

- ❑ Membership of the World Organisation for Animal Health (OIE)
 - Respect of animal health standards
 - Respect of animal welfare standards
- ❑ Existence of a residue monitoring system
 - *For veterinary medicines, pesticides, contaminants*
 - Accordance to European requirements
 - Yearly renewed and submitted to the European Commission for approval



European import conditions

Importation of poultry products in the European Union

Only approved establishments may export food products to the European union

Requirements for approved establishments

- ❑ Authorization of the competent authority, after inspection
- ❑ Guarantee of hygiene
 - Structure of establishments
 - Equipments
 - Operational processes (slaughter, cutting, storage, handling, ...)

Specific requirements for poultry products

- ❑ Notification obligation of outbreaks of avian influenza or Newcastle disease within 24 h
 - + isolation of the virus and sending to the EU Community Reference Laboratory
- ❑ Existence of a salmonella control program
 - Accordance to European requirements
 - Yearly renewed and submitted to the European Commission for approval



European import conditions

Importation of poultry products in the European Union

