

## Current information on highly pathogenic avian influenza

(38/01) On 25 September, the Friedrich-Loeffler-Institut in Germany published a press release on avian influenza in cattle. This is based on scientific studies which show that H5N1 virus replication is limited to the udder. The press release is available under the following link:

<https://www.fli.de/en/press/press-releases/press-singleview/avian-influenza-in-cattle-h5n1-virus-replication-is-limited-to-the-udder/>

The following overview from the EU Commission provides an overview of HPAI events in the European Union in the period from 1 October 2023 to 10 September 2024.

### HPAI outbreaks in the European Union (01/10/2023 – 10/09/2024)

Production type	No of outbreaks	No of animals	% of outbreaks	% of animals
Laying hen	28	1,470,826	12	20
Broiler	14	1,064,860	6	15
Turkey	73	1,658,532	31	23
Duck	50	1,136,915	21	16
Goose	24	131,616	10	2
Guinea fowl + Pheasant	3	27,041	1	0
Mixed	11	36,968	5	1
No information	30	1,721,606	13	24
Grand Total	<b>233</b>	<b>7,248,364</b>	<b>100</b>	<b>100</b>

According to the Animal Disease Information System (ADIS) of the EU Commission, the following member states were most affected by the current outbreak of bird flu:

**Bulgaria** with 22 outbreaks and 2,111,631 affected animals

**Hungary** with 84 outbreaks and 1,750,174 affected animals

**Poland** with 35 outbreaks and 883,494 affected animals

**Germany** with 32 outbreaks and 661,205 affected animals

**France** with 12 outbreaks and 408,665 affected animals

On 26 September 2024, the European Commission published Implementing Decision (EU) 2024/2529 in the EU Official Journal L concerning emergency measures in relation to outbreaks of highly pathogenic avian influenza in certain Member States following the recent HPAI outbreak in **Denmark** (municipality of Guldborgsund), **Germany** (Saxony-Anhalt state) and **Czechia** (Příbram district). The annex to the decision (EU) 2024/2529 contains the updated territorial outlines of the protection and surveillance zones as well as the provisional duration of the protective measures.

Implementing Decision (EU) 2024/2529, which has now been published, amends Implementing Decision (EU) 2023/2447 accordingly. Implementing Decision (EU) 2024/2529 is available at the following link:

[http://data.europa.eu/eli/dec\\_impl/2024/2529/oj](http://data.europa.eu/eli/dec_impl/2024/2529/oj)

## Current situation on African swine fever

(38/02) On 24 September, Implementing Regulation (EU) 2024/2526 laying down specific control measures for African swine fever (ASF) and amending Annexes I and II to Implementing Regulation (EU) 2023/594 was published in the Official Journal L. Previously, there have been new outbreaks of Af-

rican swine fever in kept porcine animals in **Italy** and **Poland**. In addition, the epidemiological situation in kept porcine animals as well as in wild porcine animals has improved in certain areas of **Hungary, Italy, Lithuania** and **Sweden**. Implementing Regulation (EU) 2024/2526 is available at the following link: [http://data.europa.eu/eli/reg\\_impl/2024/2526/oj](http://data.europa.eu/eli/reg_impl/2024/2526/oj)

### **Commission proposal to amend the rules on proof of origin for poultry meat from Brazil (Annex)**

(38/03) On 2 May, we informed you in EPEGA Circular No. 17 that the Brazilian Ministry of Foreign Trade, in accordance with Announcement No. 310, is also introducing a changed regime for issuing certificates of origin for frozen chicken meat with effect from 1 July 2024. Since then, importers must first transfer the valid licence, after which only the electronic certificate of origin will be issued by Brazil. Brazilian exporters are allocated quotas and only receive digital certificates of origin from the authorities if a certain export volume per exporter is not exceeded. This means that exporters use the digital certificate of origin to manage the quantities that are shipped within the quota.

As importers based in the EU expect considerable disadvantages from this procedure in Brazil, we at EPEGA have lobbied the Federal Ministry of Agriculture and the EU Commission to amend the regulations in Implementing Regulation (EU) 2020/761. In this context, the EU Commission has been holding bilateral talks with Brazil for several weeks and has now submitted a corresponding proposal to amend the Implementing Regulation (EU) 2020/761, which we have attached to this circular. According to this, the veterinary certificate should also be permitted to be used as an alternative proof of origin. The EU Commission will continue negotiations with Brazil and, in the event that no agreement is reached, the Commission will authorise certificates of origin in paper and digital form. We will keep you informed about further developments.

### **Determination of analytical methods applicable to official controls**

(38/05) On 13 September, Implementing Regulation (EU) 2024/2463 laying down analytical methods applicable to official controls performed for the verification of compliance of food business operators with Regulation (EU) No 2073/2005 on microbiological criteria for foodstuffs was published in the Official Journal of the European Union. The aim of the regulation is to standardise the analytical methods in order to ensure greater consistency and reliability of official controls within the Member States. The Implementing Regulation provides that analyses within the framework of official sampling must in principle be carried out in accordance with the analytical methods set out in Annex I to Regulation (EU) 2023/2005 (Article 1, paragraph 1). Alternative analytical methods are only possible by officially authorised laboratories in compliance with appropriate validation and certification requirements (Article 1, paragraph 2 and paragraph 3).

Implementing Regulation (EU) 2024/2463 shall enter into force on the twentieth day following its publication in the Official Journal, i.e. on 3 October. It is available at the following link: [http://data.europa.eu/eli/reg\\_impl/2024/2463/oj](http://data.europa.eu/eli/reg_impl/2024/2463/oj).

### **Committee for the Common Organisation of the Agricultural Markets (Annex)**

(38/06) The most recent meeting of the joint management committee for animal products took place on Thursday, on 19 September. The agenda includes inter alia the market situation in the egg and poultry sector. The next meeting of the Common Management Committee is expected to take place on 17 October 2024.

The presentation on the situation on the EU-poultry meat market was provided by the Commission and is attached and also available on the EPEGA homepage under the following link:

[http://intranet.epega.org/meta\\_downloads/96940/EU\\_market\\_situation\\_poultry-September\\_2024.pdf](http://intranet.epega.org/meta_downloads/96940/EU_market_situation_poultry-September_2024.pdf)

### **Consumption of poultry meat is on a growth path worldwide**

(38/07) The consumption of poultry meat is currently growing faster than in recent years. In its latest quarterly report in the Poultry News newsletter, Rabobank forecasts global consumption growth of 2.5 to 3 % this year, compared to 1.1 % in 2023 and 0.6 % in 2022. In Europe as well as in China, the Middle East, South and Southeast Asia, consumption is growing faster than before. Lower feed prices and high prices for competitive proteins make poultry meat an attractive product for consumers worldwide, according to the analysts. This strong demand is leading to profitable conditions for the poultry sector in most regions. The poultry sector is developing well in Europe, the Middle East and Africa, Latin America, the USA and South and Southeast Asia. Northeast Asia is an exception due to the ongoing oversupply in China and Japan. The poultry sector there is growing at an above-average rate of 6.9 and 2.9 %, which leads to relatively low prices, rising stocks and pressure on imports. In Southeast Asia and Southern Africa, El Niño-related heatwaves are leading to disappointing harvests (especially in Southern Africa) and poorer performance or production losses for broilers. However, the situation in Southeast Asia is improving, especially during the current rainy season, and the situation is expected to improve further as climate patterns shift towards La Niña.

There are also several factors that continue to influence trading. Countries in Africa and the Middle East, for example, are placing ever higher demands on food safety. In Northeast Asia, there is also weak demand in addition to the aforementioned oversupply – including a 35 % drop in Chinese imports in the first half of 2024. However, in this region, the market for processed chicken products and breast meat is expected to remain strong, with relatively high prices. However, prices for chicken thighs – a product sold primarily in China – will remain under pressure. Geopolitical tensions also continue to have an impact on global trade. The growing trade tensions between China, the European Union and the USA should be mentioned here. The unrest in the Middle East also continues to affect world trade between the EU and Asia. According to Rabobank analysts, it is therefore important to avoid market imbalances. “Especially against the background of the persistently high risks such as animal diseases, feed price fluctuations and geopolitical tensions, a disciplined expansion of supply is necessary in order to continue to operate under balanced market conditions.”

In Europe, the poultry sector is performing well thanks to strong demand and slightly falling feed prices. Breast meat prices in Europe have held up well. The good conditions on the European market are related to the strong demand for poultry. This year, production is expected to increase by 3 to 4 %. Chicken meat is currently benefiting from low prices compared to beef and pork. In addition, chicken meat benefits from a lower environmental footprint for some retailers and restaurant chains compared to beef and pork, which also improves the competitiveness of chicken in the protein market. Despite the rapid growth in production, the markets are currently in balance, according to Rabobank. In the first half of 2024, total imports into the European Union increased by 3 %, mainly due to the recovery of imports from the United Kingdom. At the same time, imports from key supplier countries such as Brazil (-9 %), Ukraine (-3 %) and Thailand (-3 %) fell by a total of 4 % compared to 2023. This is mainly due to lower imports of raw and salted chicken. Imports of processed chicken meat from Thailand and China continue to increase.

EU production rose by 4.5 % in the first six months of 2024 compared to the same period last year. Growth was particularly strong in countries such as France (+10 %), Poland (+7 %), Hungary (+11 %), Spain (+5 %) and Italy (+6 %). In Germany, production rose by only 1 %, and in the Netherlands, it even fell by 3 %, which is due to the switch to meat concepts in which fewer chicks are reared per square metre. The outlook for the European poultry sector remains good, according to the bank. "The biggest chal-

lenge will be to keep markets balanced under current conditions", the analysts said, noting that feed prices are expected to continue to fall and demand for chicken is expected to rise seasonally in the fourth quarter. However, there are also imponderables such as bird flu in the winter season and the introduction of the EU Deforestation Regulation planned for 2025. Both have the potential to disrupt the markets. In terms of the impact of the introduction of the EU deforestation regulation, Rabobank Research expects prices for soybean meal to rise by 5 to 10 % as a result.

### **Amending Lists of Establishments**

(38/08) The European Commission has changed the lists of establishments approved for delivery to the EU for the game and poultry sector for the following third countries:

**Meat from poultry and lagomorphs:** Iceland, Canada, Switzerland, USA, United Kingdom

**Meat products:** Australia, Iceland, Switzerland, Thailand, Turkey, Ukraine, USA, United Kingdom, United Kingdom (Northern Ireland)

**Minced meat, meat preparations, MSM:** Argentina, Iceland, Ukraine, USA, United Kingdom

**Meat from farmed game:** New Zealand

**Wild game meat:** Australia, Iceland, United Kingdom

The current lists of establishments can be found on the website of the EU Commission under the following link:

<https://webgate.ec.europa.eu/tracesnt/directory/listing/establishment/publication/index#!/search>

### **Annexes:**

- Proof of origin – Draft amending Implementing Regulation (EU) 2020/761
- EU market situation poultry, September 2024

### **Imprint**

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