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## **Report Name:** Poultry and Products Annual

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### **Report Highlights:**

Driven by strong internal demand, EU chicken meat production is expected to continue growing in 2024 and 2025. In 2025, Poland will remain the largest EU chicken meat producer, accounting for more than 22 percent of total EU production. The EU trade surplus in chicken meat is expected to increase as HPAI related bans are lifted and imports from Ukraine are increasingly constrained by EU policy and regulations.

**DISCLAIMER**

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## Executive Summary

**Driven by strong internal demand, EU chicken meat production is expected to grow in 2024 and 2025.**

In 2025, Poland will remain the largest EU chicken meat producer, accounting for more than 22 percent of all EU production. Fueled by both domestic and export demand, Polish chicken production continues to grow, benefiting from lower feed costs and reduced competition from Ukraine. The EU chicken industry generally operates on a short two to three-month production cycle which is very reactive to market conditions and external events. USDA forecasts are therefore based on assumptions and information that are available at the time of publication.

**EU chicken meat trade surplus is expected to increase in 2024 and 2025 as imports are declining and exports are regaining lost ground.**

The UK is expected to become the largest supplier of poultry meat to the EU. UK and EU poultry traders are adapting to post-Brexit conditions, complying with EU veterinary rules and other requirements. The UK maintains a competitive advantage in shipping fresh/chilled chicken meat to the EU, while importing less expensive Ukrainian chicken meat at zero duty. EU imports of Brazilian chicken meat remain constrained by ongoing sanitary restrictions that apply to certain export facilities.

**While EU chicken meat imports from Ukraine have doubled since 2022, Ukrainian exporters now face increasing constraints with EU regulations and export licenses.**

Several trade bans related to Highly pathogenic avian influenza (HPAI) have been lifted or have been amended to reflect regionalization. **This will propel growth of EU exports in 2024.** The UK remains the largest customer of EU chicken meat. Exports of low-priced frozen cuts (mostly dark meat) and mechanically deboned chicken meat to sub-Saharan Africa are expected to increase

**Despite food inflation and higher energy costs, EU chicken meat consumption is expected to remain strong in 2024 and 2025.**

Convenient to use and less expensive relative to other animal protein, chicken meat is the animal protein of choice. EU chicken consumption is increasing in line with demographic growth. Consumption is also slowly increasing on a per capita consumption basis. While premium production schemes like organic, free range, and GMO-free fed chicken have gained a lot of support throughout the EU, consumption of less expensive chicken meat cuts is growing at a much faster rate compared to more premium products like breasts and whole birds.

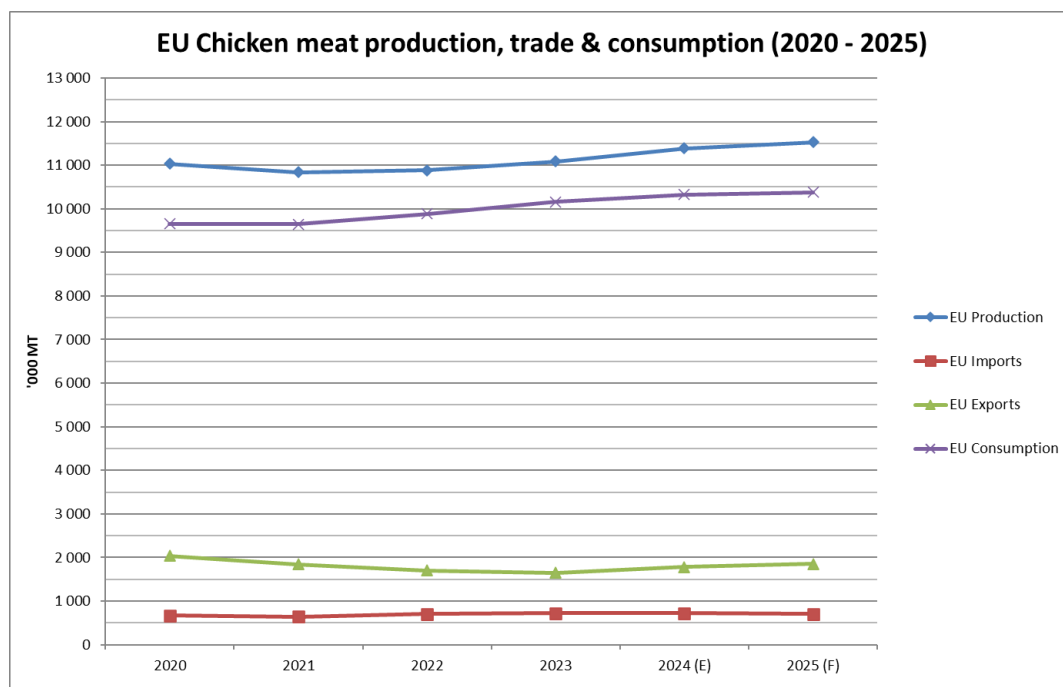
## Production, Supply and Distribution: Chicken Meat PS&D Table

Meat, Chicken Market Year Begins European Union	2023		2024		2025	
	Jan 2023		Jan 2024		Jan 2025	
	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)	11060	11084	11200	11385	0	11530
Total Imports (1000 MT)	722	725	745	720	0	700
Total Supply (1000 MT)	11782	11809	11945	12105	0	12230
Total Exports (1000 MT)	1649	1649	1745	1780	0	1850
Human Consumption (1000 MT)	10133	10160	10200	10325	0	10380
Other Use, Losses (1000 MT)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT)	10133	10160	10200	10325	0	10380
Total Use (1000 MT)	11782	11809	11945	12105	0	12230
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	11782	11809	11945	12105	0	12230

(1000 MT)

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

**Figure 1**



### *Production*

Estimates for EU production in 2023 have been slightly revised due to newly available production data from Belgium, France, Germany, Italy, Spain and Poland. **EU chicken meat production is expected to increase by 2.7 percent in 2024.** This increase is driven by sustained domestic and export demand. While economic conditions throughout Europe have improved since the COVID-19 crisis, market

conditions continue to favor less expensive animal protein. This is expected to continue in 2024 and 2025.

An estimated 98 percent of all EU chicken production consists of broiler meat. The remaining 2 percent is primarily meat produced from laying hens and cocks. According to data from the European Food Safety Authority (EFSA), as of July 2024, Europe had [the lowest number](#) of recorded HPAI cases in poultry and wild birds since 2019/2020. The impact on the EU chicken meat sector is limited.

Driven by consumer demand, the expansion of free-range / organic chicken production in several EU Member States is a growing concern for EU veterinary authorities. The smaller and more specialized production systems are believed to be more vulnerable to HPAI outbreaks. Chickens roaming outside are more likely to come into contact with wild birds that carry the HPAI virus.

**Poland** is the largest chicken producer in the EU, accounting for more than 22 percent of all EU chicken production. Close to 70 percent of Poland's production is exported to EU (44 percent of the production) or to extra-EU countries (26 percent of the production). FAS Warsaw estimates that Polish chicken production will grow by 7 percent in 2024 and 2 percent in 2025. After struggling with high energy and high feed costs in 2022, the economic situation of the Polish poultry sector has improved significantly as feed costs have declined and wholesale / retail prices have increased. As there continues to be a shortage non-GMO feed, the idea of reducing or eliminating GE soybean meal from feed rations is unrealistic. The Polish government is therefore proposing to extend the suspension of the GE feed ban from July 1, 2025 to January 1, 2030.

Chicken meat production is slowly growing in **Belgium** despite a 10 percent decline in the number of poultry farms. This trend underscores the growing concentration of the production in the Flanders region.

Chicken meat production in the **Netherlands** is slowly declining as more producers are favoring higher quality, lower population density, "slow-growth birds." About 40 to 50 percent of Dutch production is now dedicated to this form of higher-end production. 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" label is owned by the Dutch Society for the Protection of Animals (SPA). SPA cooperates with producers and retailers throughout the supply chain. Currently, the "Better Life" label is one of the most successful sustainability labels in Europe. It is ten times larger than the organic label used by the meat sector. It has quickly become a standard for the sale of chicken meat in supermarkets.

In **France**, chicken meat production is slowly increasing driven by domestic demand. While French extra-EU exports have stagnated (mainly due to higher costs), the French domestic retail market for chicken meat remains buoyant. French households generally prefer to purchase chicken products that have been produced in France. The HRI sector is a notable exception where most chicken meat is imported.

Like beef and pork production, chicken meat production in **Germany** is expected to grow only marginally in 2024 and 2025. Stricter regulations on animal husbandry under the Animal Welfare

Initiative are lowering population densities on German farms. Today, it is almost impossible to obtain permits for new sheds, and this is a significant factor limiting growth in production.

In **Italy**, chicken meat production is expected to grow and will likely reach record levels achieved prior to the HPAI outbreaks in 2020.

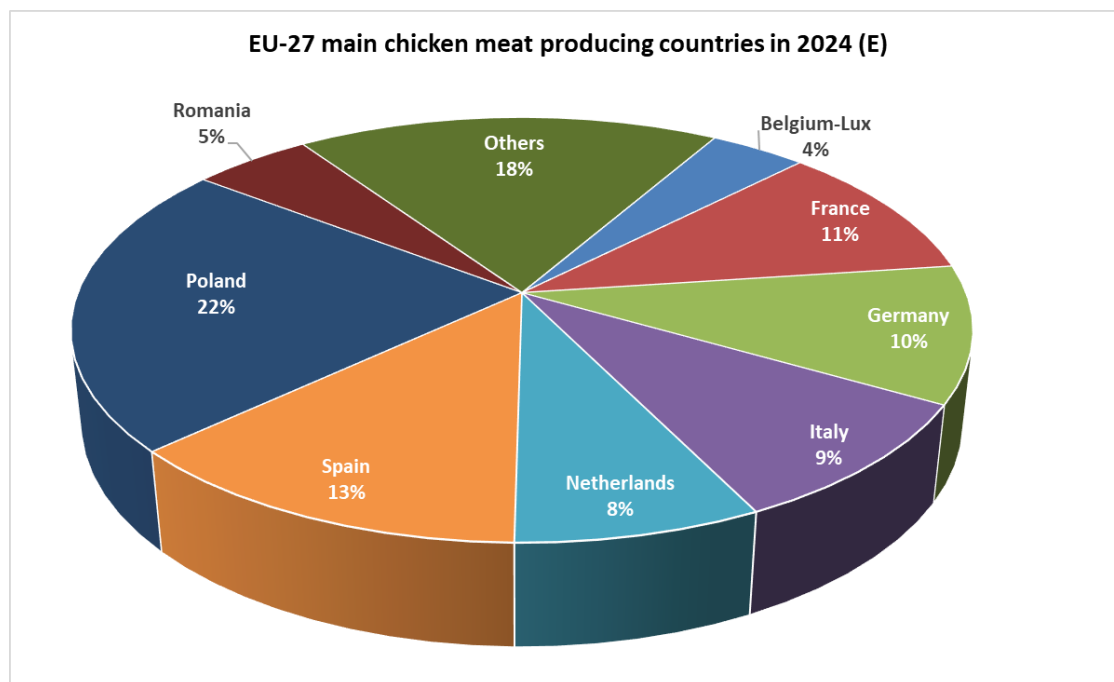
Poultry production in **Spain** is expected to expand driven by strong demand and price competitiveness relative to other EU Member States. However, many operators in the Spanish poultry sector remain very anxious over the risk of new HPAI outbreaks and the possibility of soybean feed supply disruptions as the new EU Deforestation Regulation (EUDR) is implemented.

Although bird flu outbreaks have negatively affected **Hungary**'s poultry industry, chicken production remains stable due to predictable domestic demand and increasing investment. At the same time, an estimated 15 percent of Hungarian poultry producers gave up their business in 2023, leading to an inevitable consolidation of production.

In **Romania**, the chicken meat industry is expected to continue growing in 2024 (+3.2 percent) and 2025 (+2.7 percent) due to steady consumer demand and low feed prices.

The Ukrainian company MHP has also recently announced plans to build three chicken farms (producing 6 million chicken birds annually) in **Croatia** by 2027. Another Ukrainian company, Petrinja Chicken Company (PCC) also announced a 500-million-euro investment in Croatia for the production of 150.000 MT of chicken meat annually by 2026. The new fully vertically integrated farms are expected to focus as much as 90 percent of production for export to other EU member states and to Asia.

**Figure 2**



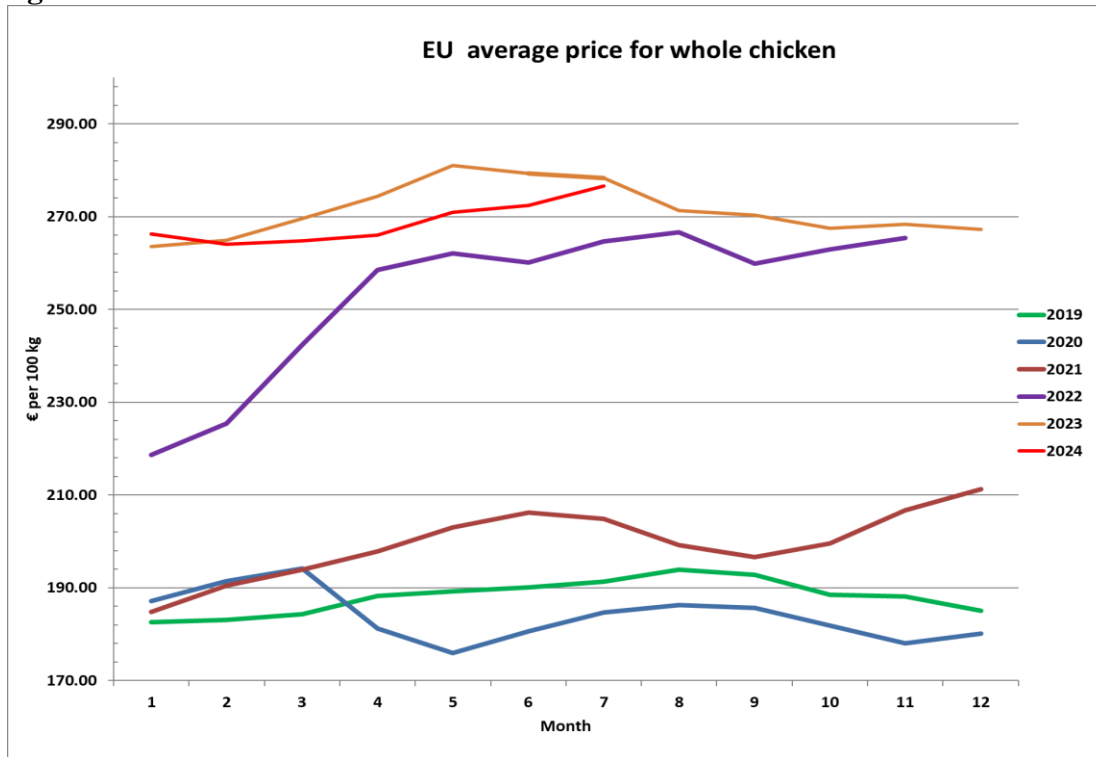
(Source FAS Posts)

## Price

### Historically high EU chicken prices

After historically high prices in 2021 and 2022, the average price of EU chicken meat fell in 2023, benefiting from lower feed costs. Initial data for the first six months of 2024 indicate that prices are again rising driven by strong domestic demand.

**Figure 3**

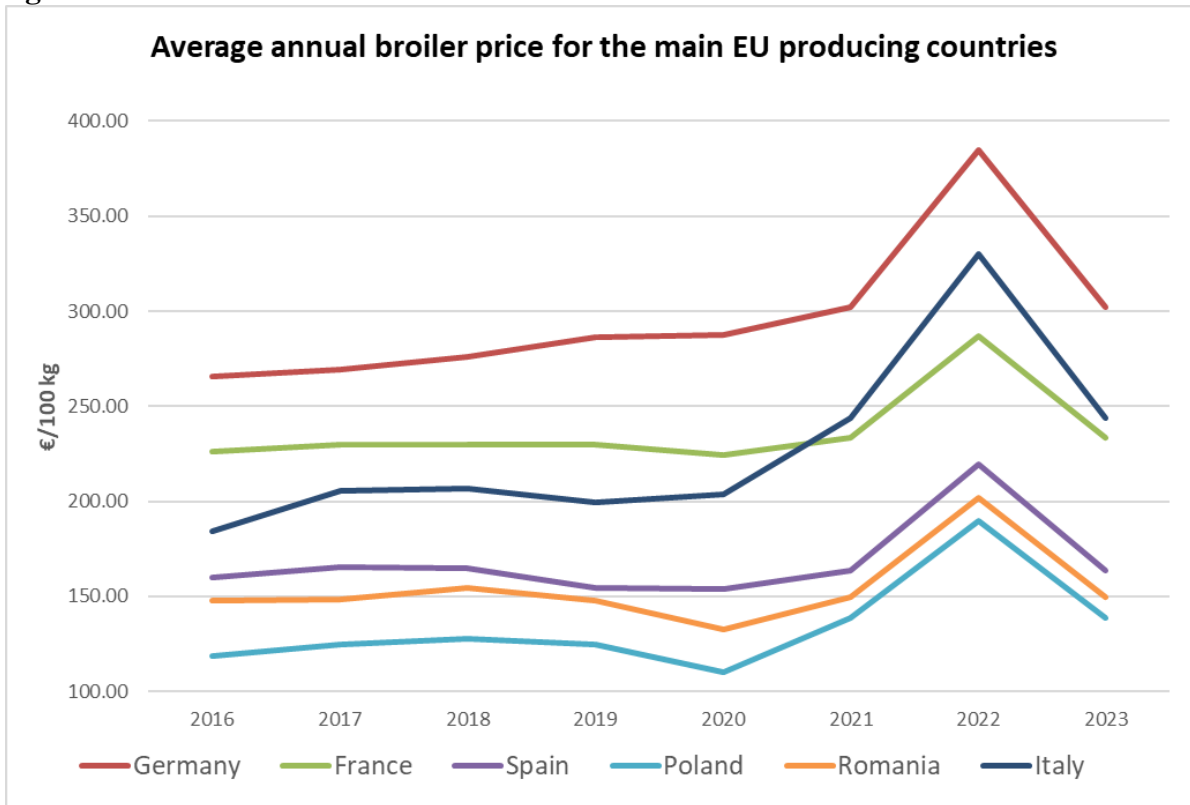


(Source: European Commission, data for broilers only)

### But significant price differentials within the EU

Within the EU there are significant price differences between 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 is why Polish chicken meat shipments to other EU Member States have increased significantly in recent years, to the point of even displacing inexpensive imported Brazilian chicken meat.

**Figure 4**



(Source: European Commission, data for broilers only)

### **Trade**

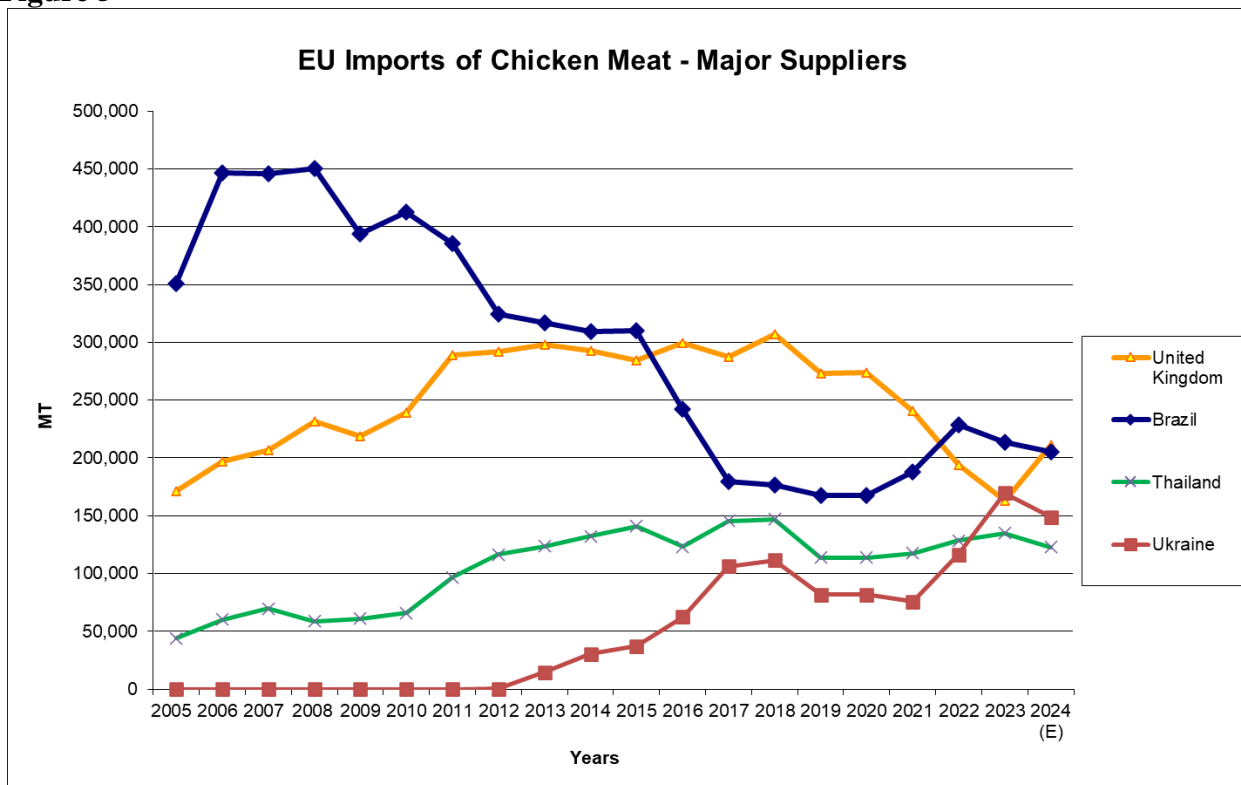
**The EU chicken meat trade surplus is expected to increase in 2024** as EU imports will slightly decrease (minus 0.7 percent). Exports are expected to grow by 7 percent. The UK is the EU’s largest supplier and customer of chicken meat. **However, the balance of trade favors the EU. The EU exports almost 4 times more volume to the UK than it imports.**

**As extra-EU imports are set to decline in 2024 and 2025, the UK is set to gain an increasing share of the EU import market.**

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 2024, **Brazil is expected to lose its status as the largest supplier of chicken meat to the EU.** The EU's largest trading partner will be the UK. Since Brexit, the UK is considered to be an extra-EU trading partner, and therefore non-EU trade arrangements apply. This includes [prohibiting](#) imports of chilled and frozen minced poultry meat as well as mechanically separated poultry meat. Imports of chicken meat from UK declined sharply between 2021 and 2023. In 2021, UK exporters faced increasing border controls and inspections as the Brexit transition period started on January 1, 2021. Many of the initial administrative challenges appear to have been resolved and British chicken meat is again flowing regularly into the EU. Moreover, as UK imports more Ukrainian chicken meat under a zero-duty regime, UK exporters are attracted to supplying fresh/chilled chicken meat to the EU.

Following an audit led by the EU's DG Sante in October and November 2023, the EU has acknowledged that Brazil has improved controls on poultry meat sent to Europe. The audit noted that Brazil has largely addressed the recommendations of previous audits in 2017 and 2018. However, the EU nevertheless suspended chicken meat trade from several plants belonging to the [BRF company](#) due to improper sanitary conditions. These have affected Brazil's ability to export chicken meat to the EU.

In 2021, Brazil requested [WTO consultations](#) 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 EU's food safety criteria for salmonella on fresh poultry meat and certain poultry meat preparations. At that time, Brazil noted that there is no technical or scientific justification for the application of stricter microbiological criteria, and therefore Brazil views

this measure as discriminatory and as a violation of the rules of the Agreement on Sanitary and Phytosanitary Measures of the WTO.

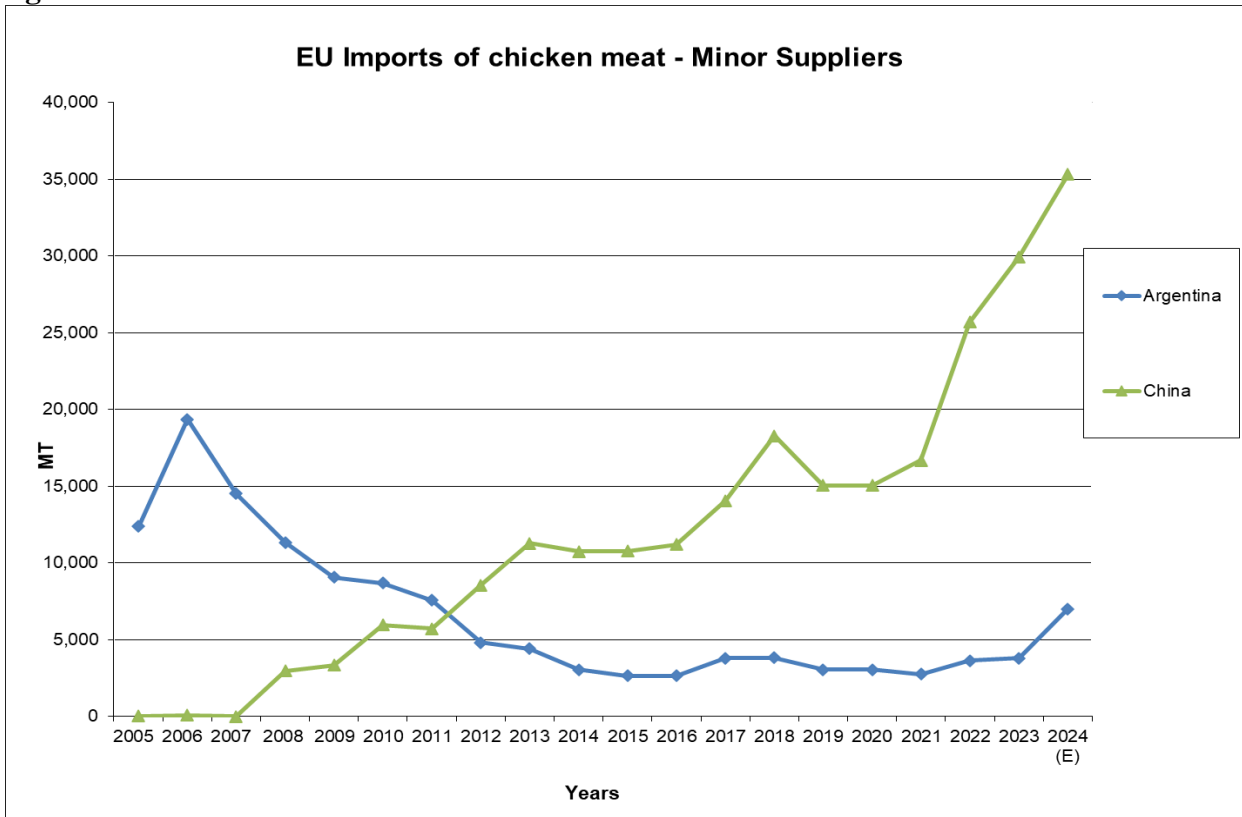
The EU-MERCOSUR Free Trade Agreement announced in the summer of 2019 could eventually facilitate Brazilian exports of poultry meat to the EU, but a final ratification of this Agreement remains very uncertain. Several EU Member States have been very vocal in expressing their concerns. France, for example, is against the agreement, and Germany has also indicated its own concerns.

**Ukraine is the third largest supplier of chicken meat to the EU.** Russia's illegal invasion of Ukraine in February 2022 ushered significant changes to the 2014 Deep and Comprehensive Free Trade Agreement (DCFTA) between the EU and Ukraine. The EU-Ukraine DCFTA set Tariff Rate Quotas (TRQs) for chicken parts and whole birds. On May 30, 2022, the EU enacted [EU regulation 2022/870](#) that established Autonomous Trade Measure (ATM) to support the Ukrainian economy. The 2022 ATM established temporary free-trade measures to supplement the trade concessions of the DCTA. Ukrainian chicken meat was made immediately eligible to enter the EU without tariffs or quotas. With this measure in place, EU chicken meat imports from Ukraine almost doubled in 2022 and further increased in 2023. However, with the surge of imports from Ukraine, the EU Council amended the ATM while also [extending](#) it until June 5, 2025 ([Regulation \(EU\) 2024/1392](#)).

Under the new ATM rules, the EU Commission can act to impose any measures it deems necessary when there are significant disruptions to the EU market due to Ukrainian imports. The new safeguard measures, designed to protect EU farmers, enable the EU to trigger emergency measures for a list of sensitive agricultural products including poultry, chicken meat and eggs. When imports of these products surpass the average of import volumes recorded in the second half of 2021, and all of 2022 and 2023 equivalent to approximately 133.000 MT, tariffs will be re-imposed. At the same time, the Ukrainian government has also set up a system of export licenses. Consequently, **EU imports of Ukrainian chicken meat are expected to decline in 2024 and 2025** compared to previous years.

A significant share of the Ukrainian chicken meat exports to the EU goes to Slovakia where it is processed by a local Company named [EU Poultry](#) which has a partnership with the Ukrainian company MHP. The proximity of the Slovakian facility to the Ukrainian border has facilitated shipments of chilled chicken meat from the Ukrainian slaughterhouses. The final product can then be sold as an EU processed product, essentially bypassing the need to declare Ukrainian origin to the final consumer.

**Figure 6**



(Source Trade Data Monitor)

Argentinian chicken meat exports to the EU have significantly decreased due to rising competition with Brazil. On the other hand, **Chinese chicken meat exports to the EU have increased significantly** since 2021. Chinese chicken producers located in Shandong province benefit from the tariffs rate quotas on heat-treated chicken meat that were negotiated in 2019.

**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**

After a 3 percent decline in 2023, **EU chicken meat exports are expected to increase by 8 percent in 2024**, driven by much higher exports to Democratic Republic of Congo, Saudi Arabia, Vietnam, Angola, Vietnam, Guinea and the Philippines, that is more than offsetting lower export volumes to the UK, Ghana, Ukraine, Cuba and Benin. Several countries, like the Philippines, that have historically imported EU chicken meat, have now removed their HPAI restrictions on EU poultry meat.

## HPAI Affecting EU exports of chicken meat

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
China	Armenia
South Africa	Belarus
South Korea	Cuba
	Egypt
	Hong Kong
	Japan
	Kazakhstan
	Mexico
	Russia
	Saudi Arabia
	Taiwan
	Ukraine
	United Arab Emirates

Polish poultry exporters are hoping that following the Polish President's visit to China in June 2024, China will recognize Poland's HPAI regionalization status, thus allowing exports of Polish chicken meat to China. In 2020, China closed its market to Polish poultry. The Polish government is also working to re-open the South African market for Polish poultry. This could happen in 2025.

Thailand, Japan and the United States have all banned imports of poultry meat and products from EU countries that have introduced HPAI vaccination programs. This affects France indirectly since it currently does not export chicken meat to those countries.

More updated information on HPAI trade restrictions can be found on the EU Commission [trade barrier website](#).

### **The UK is the largest customer of EU chicken meat. Dark chicken meat cuts are exported to Africa**

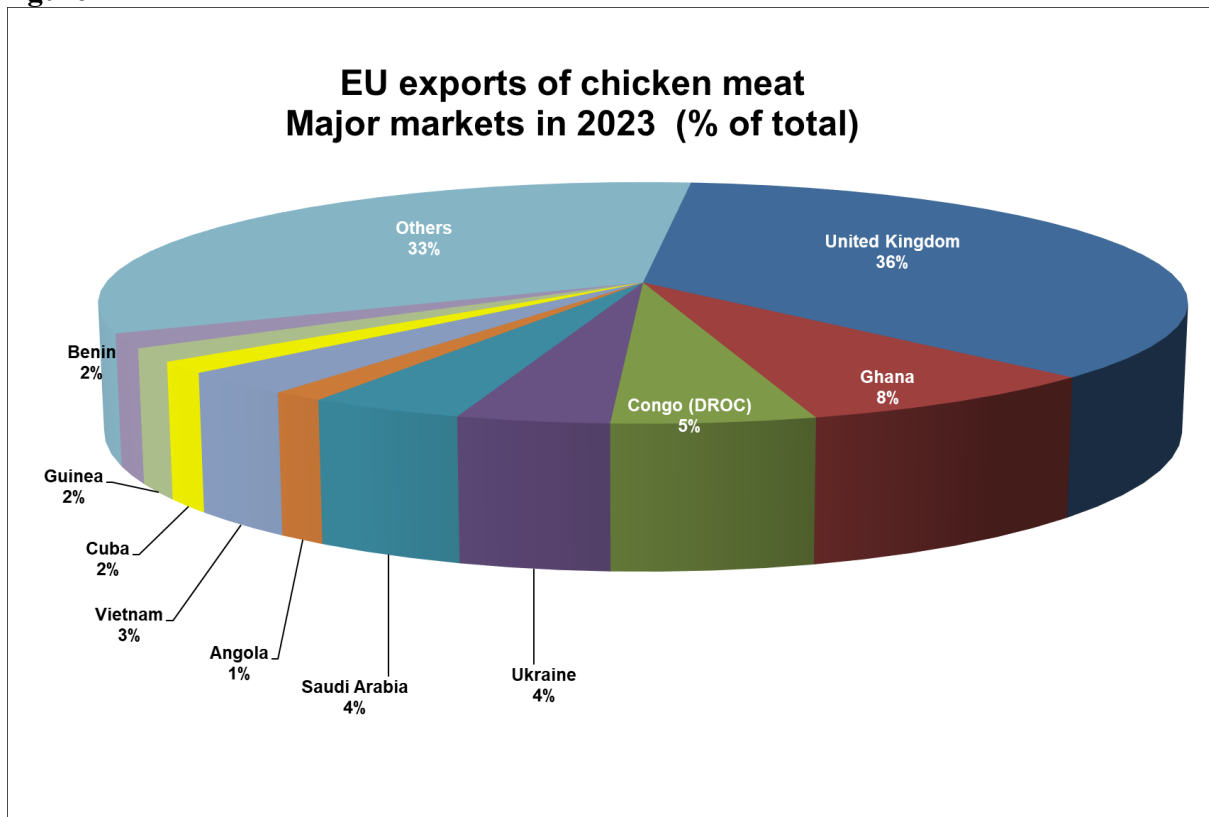
The UK is now the single largest client for EU chicken meat, accounting for 36 percent of EU exports. The EU exports to UK consist of mostly fresh and chilled chicken cuts (close to half of exports) as well as preserved or prepared chicken meat and offals. Sub-Saharan countries led by Ghana, Democratic Republic of Congo, Angola, Liberia, Benin, and Guinea are major outlets for low-priced, frozen chicken meat cuts (mostly dark meat and mechanically deboned chicken meat). Vietnam, Philippines and Cuba are also major export markets for cheap EU frozen chicken cuts. Exports to Benin in 2024 might be impacted by the crackdown on illicit trade between Benin and Nigeria.

After several years of decline, EU exports of frozen whole chickens to Saudi Arabia have grown by 30 percent in the first half of 2024, led by higher French exports. It appears that EU chicken meat has

regained competitiveness in the Saudi market while Brazilian, Ukrainian and Russian chicken meat have lost ground.

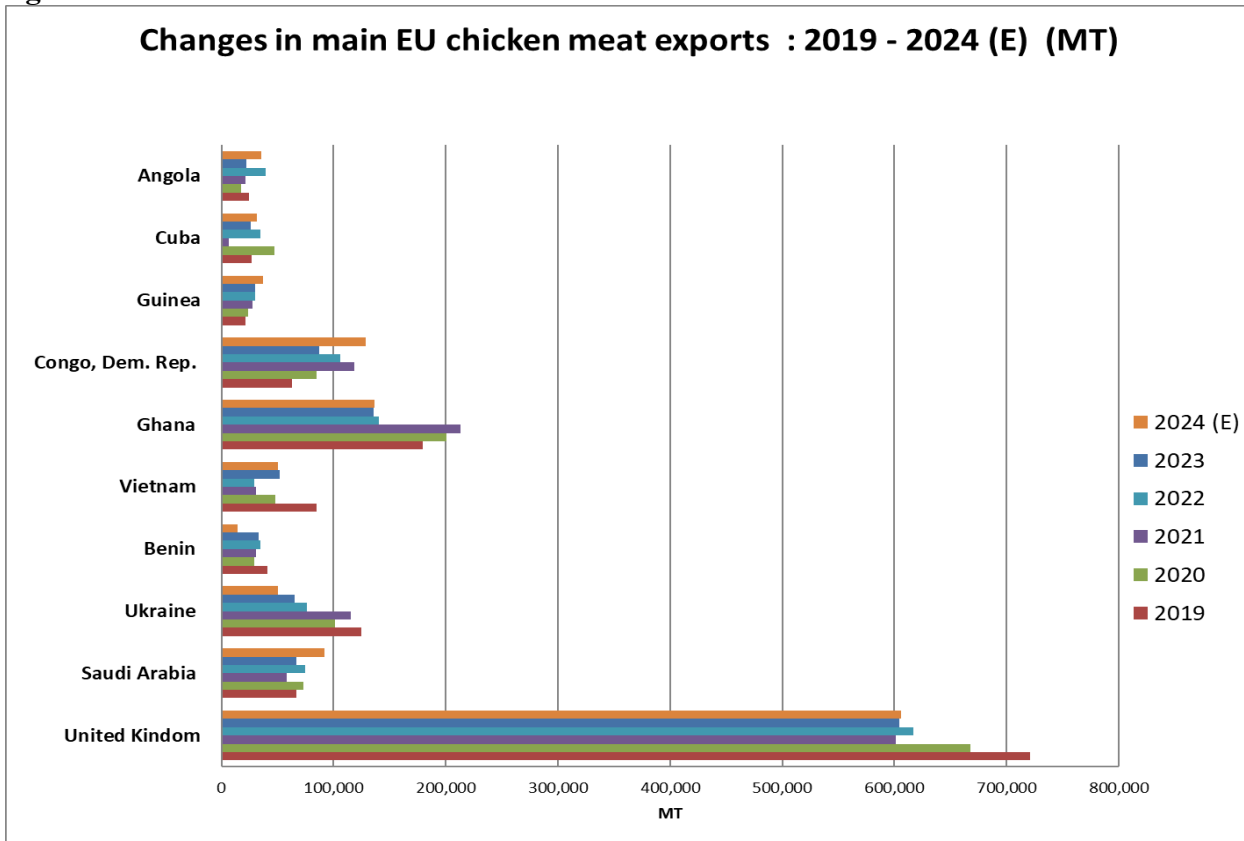
While EU domestic markets favor breast and premium white meat cuts, outside the EU, the export market for dark meat cuts remains very competitive, despite of the increasing costs of production.

**Figure 7**



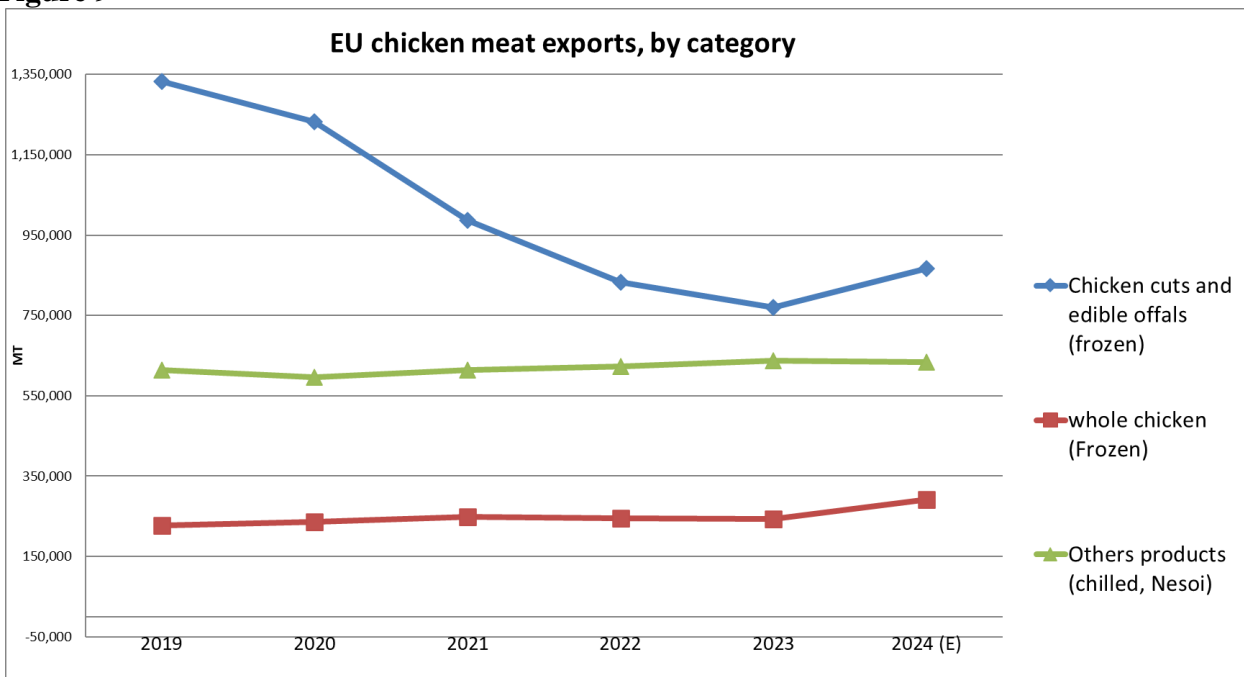
(Source Trade Data Monitor data)

**Figure 8**



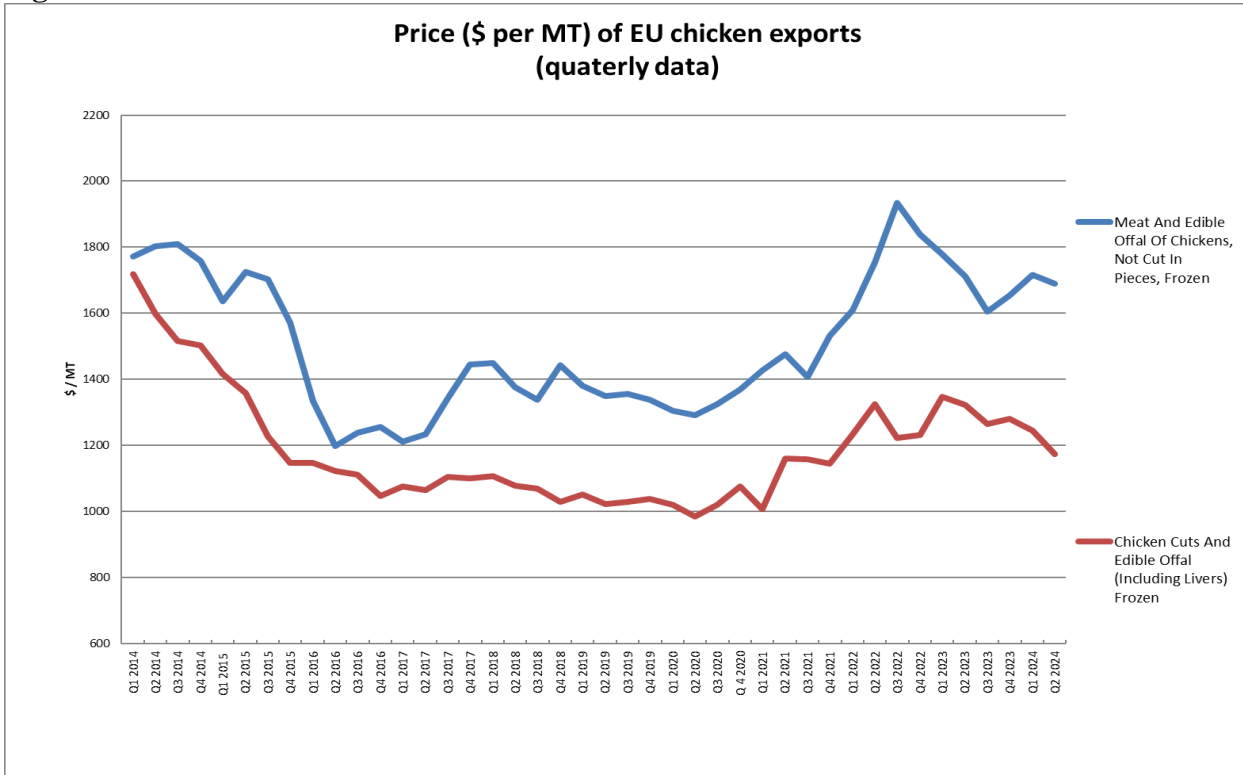
(Source Trade Data Monitor, FAS Posts estimates)

**Figure 9**



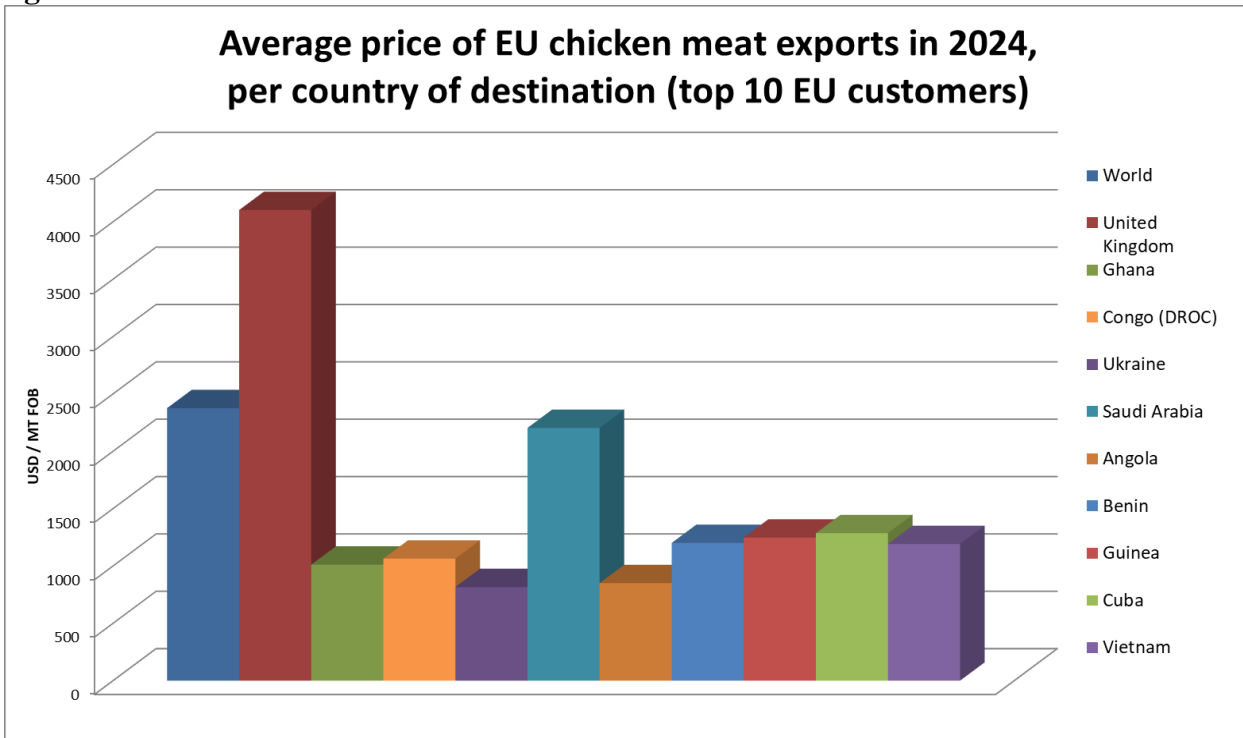
(Source Trade Data Monitor)

**Figure 10**



(Source Trade Data Monitor)

**Figure 11**



(Source Trade Data Monitor, data for Jan- June 2024)

## *Domestic Consumption*

### **Chicken meat consumption will continue to grow**

Numerous data sources indicate that **chicken meat consumption is now the preferred (less-expensive) animal protein choice in the EU**. After pork, it is the second largest meat consumed in the EU. EU chicken meat consumption is expected to grow by 1.6 percent in 2024 and 0.5 percent in 2025. Data show that growth in chicken consumption is closely related to demographic growth, and per capita consumption is expected to slightly increase. EU chicken meat consumption in 2024 and 2025 will likely continue to benefit by the influx of 6 million Ukrainian war refugees in Europe as well as a steady flow of migrants from the southern hemisphere.

As the cheaper source of animal protein, chicken meat remains somewhat more insulated from the pressures of high food inflation and energy costs in Europe. 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 their 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.

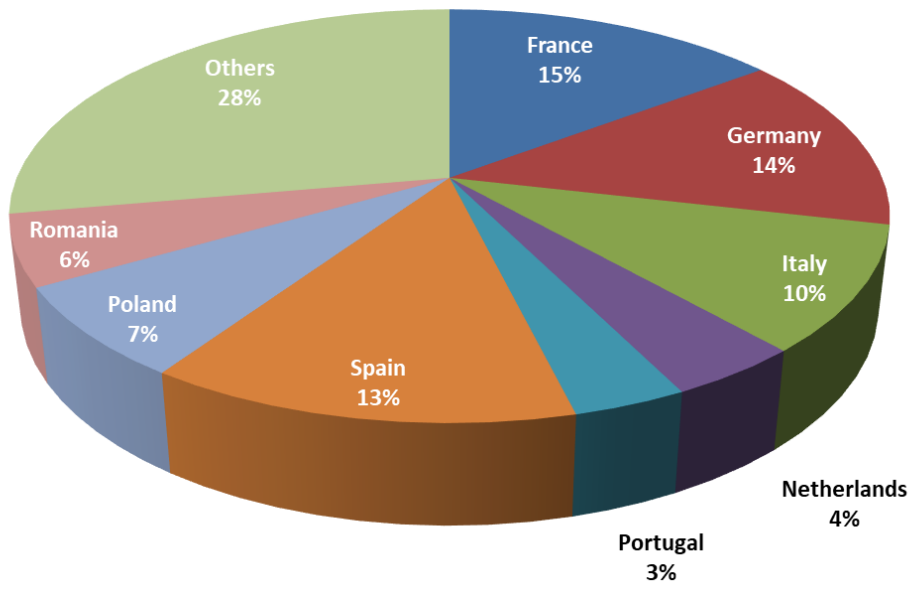
The free-range sector in France represents about 10 percent of total consumption. Media campaigns by animal rights organizations such as the L214 association in France have drawn attention to the mistreatment of chicken on poultry farms and slaughterhouses. This has not had a significant impact on chicken 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 the Netherlands, Germany and Austria. In some cases, retail prices for these products are double the price of the more conventional options. Locally sourced chicken is also driving demand. In Austria, retailers are prominently advertising local and regional suppliers. At same time, this exposes the glaring conundrum of increasing consumer demand for locally produced chicken, while many communities are hardening their resistance to expanding poultry farms in their communities.

## **Figure 12**



### EU main chicken meat consuming countries in 2024 (E)



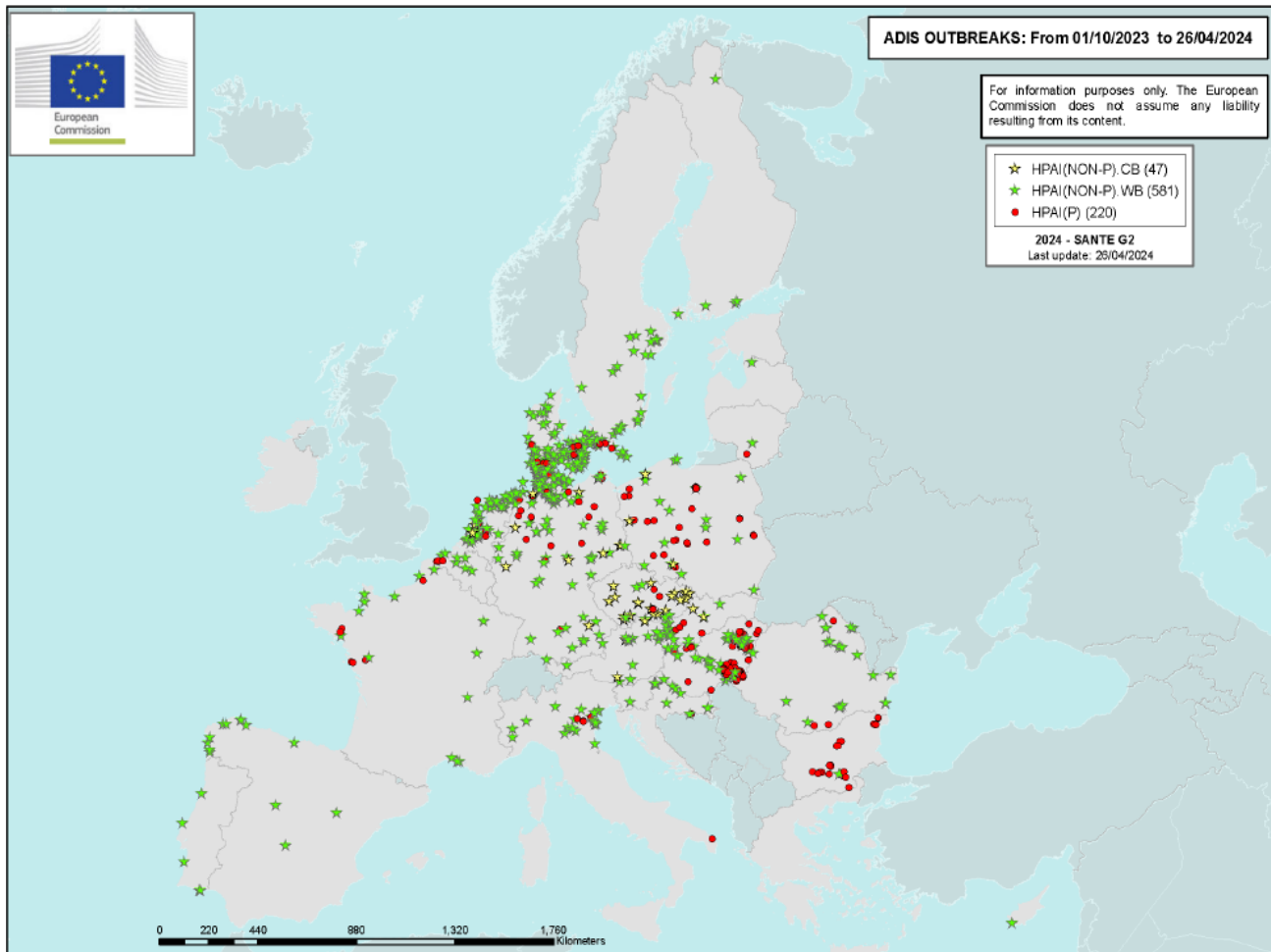
(Source FAS Posts)

## Policy

### Avian Influenza (AI) Situation Update

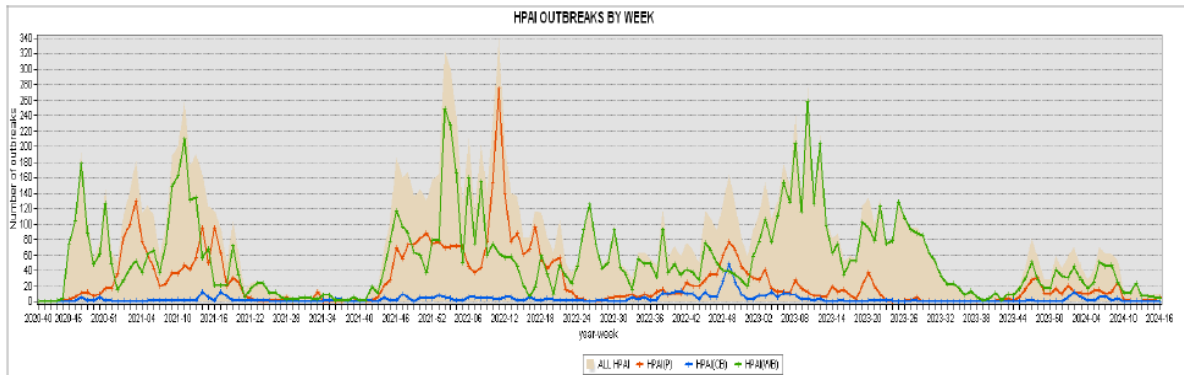
With the discovery of HPAI outbreaks, there is a fear that the disease may already be endemic in wild bird populations throughout the EU. In the 2023-2024 period, the overall number of HPAI detections decreased compared to previous two years. According to the latest quarterly monitoring [report](#) by EFSA, ECDC, and EURL (Between 16 March and 14 June 2024, 42 highly pathogenic avian influenza (HPAI) A(H5) virus detections were reported in domestic (15) and wild (27) birds across 13 countries in Europe).

**Figure 13** : Distribution of AI Infections Since October 1, 2023



Source: European Commission

**Figure 14: Weekly Distribution of AI Outbreaks in Europe**



Source: European Commission

In February 2023, the EU published [Regulation 2023/361](#) allowing EU Member States to vaccinate poultry against AI under certain conditions. Vaccination trials have been carried out by certain Member States since 2022. For more information about the legal framework for vaccination against AI, please refer to the [presentation](#) from the Commission to the World Organization for Animal Health in May 2023. Between the period October 2023 to March 2024, 29,252,582 ducks were vaccinated in France.

## Veterinary Medicine Legislation

### *Veterinary Medicinal Products Regulation (VMP Regulation)*

On October 8, 2021, the EU published [Regulation \(EU\) 2021/1756](#) concerning official controls to ensure compliance with the prohibition on the use of certain antimicrobials. The Regulation is a central pillar to the [Farm to Fork Strategy](#) aiming to reduce overall use of antimicrobials by 50 percent for farmed animals and in aquaculture by 2030. This is part of a larger effort to also ban the preventive use of antibiotics in groups of animals. On October 6, 2021, [Commission Delegated Regulation \(EU\) 2021/1760](#) was adopted establishing the criteria for antimicrobials to be reserved for use by humans. On January 28, 2022, the EU implemented the new framework for the [Regulation \(EU\) 2019/6](#) on Veterinary Medicinal Products (VMPs). [The main objectives of the legislation are to:](#)

- [establish a modern, innovative and fit for purpose legal framework for VMPs,](#)
- [provide incentives to stimulate innovation for VMPs and increase their availability,](#)
- [strengthen the EU's efforts to fight antimicrobial resistance.](#)

On July 20, 2022, the Commission adopted [Implementing Regulation \(EU\) 2022/1255](#) that provided a list of antimicrobials reserved for human medicine. In February 2023, the EC adopted [Delegated Act 2023/905](#) implementing Article 118 of the Veterinary Medicinal Products Regulation imposing limitations on the use of antimicrobials for animals exported from third countries into the EU.

On February 12, 2024, [Commission Implementing Regulation \(EU\) 2024/399](#) was published in the Official Journal amending model certificates for the entry into the Union of consignments of certain products of animal origin and certain categories of animals. The new models will be implemented by the respective exporting countries. On June 28, 2024, the EU notified to the WTO's Committee on Sanitary and Phytosanitary Measures ([G/SPS/N/EU/778](#)) about the upcoming publication of a third-country list

for compliance with Article 118 of Regulation (EU) 2019/6 on veterinary medicinal products. The final date for comments is August 27, 2024. The regulation will take effect 20 days after its publication in the Official Journal of the European Union, with implementation starting on September 3, 2026. It is important to note that the EU is requiring the two additional animal health attestations to be included on the health certificates by September 3, 2024, yet not requiring the new attestations to be attested until the actual implementation of the VMP Regulation on September 3, 2026. Between these two dates, trading partners are permitted to either delete or cross out the new attestations.

### *New EU Animal Welfare Legislation (AW)*

The European Commission (EC) has announced its intention to revise animal welfare legislation as part of the Farm to Fork Strategy developed in May 2020. On December 7, 2023, the EC published a proposal on [the protection of animals during transport](#). This proposal includes requirements for animals imported from third countries into the EU, necessitating additional training for inspectors, transporters and veterinarians. As such, the new requirements will almost certainly increase the administrative and financial burden across the entire sector. The Dutch poultry organization NEPLUVI recently noted that the newly proposed animal welfare regulations imply a production density of 11 kilograms per square meter and an estimate 50 grams of growth per day. This would result in a reduction the EU's production self-sufficiency from 113 percent to 31 percent. For more information, please refer to the following GAIN Report: [European Union: EU Proposes New Regulation on Animal Welfare During Transportation](#).

### **Related reports from FAS Posts in the European Union:**

[Poultry Market Update | BU2024-0011Sofia](#) | Bulgaria Published On: July 09, 2024

[Dutch Loss of Manure Derogation | NL2024-0007The Hague](#) | Netherlands  
Published On: June 06, 2024

[EU Proposes New Regulation on Animal Welfare During Transportation | E42024-0013 Brussels](#)  
USEU | European Union Published On: June 03, 2024

The GAIN Reports can be downloaded from the following FAS website:  
<http://gain.fas.usda.gov/Pages/Default.aspx>

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For additional livestock policy related information, please contact:  
Tania De Belder (FAS Brussels UNITED STATES Mission to the EU)  
E-mail: [tania.debelder@usda.gov](mailto:tania.debelder@usda.gov)

### **Attachments:**

No Attachments