INFORMATION SHEET 1 – CHICKEN MEAT PRODUCTION IN THE EU & UK

PRODUCTION & TRADE

In 2020, 6.4 billion chickens were slaughtered in the EU, producing around 11 million tonnes of chicken meat (Table 1). EU chicken meat production was valued at US$ 8.6 billion and US$ 3.3 billion in the UK in 2020 (FAOSTAT[1]). In the UK 1.15 billion chickens were slaughtered in 2020, producing 1.8 million tonnes of chicken meat (Table 1).

Poland is the largest producer in the EU, accounting for around one fifth of EU chicken meat production (Table 1). The largest broiler chicken producing company in the EU+UK is LDC in France, producing 578.5 million broilers annually (Table 2).

Table 1. Top 10 chicken meat producing countries in the EU+UK. Source: FAOSTAT[1].

Country	Chicken meat production 2020 (tonnes)	Share of EU chicken meat production 2020 (%)	Chickens slaughtered 2020 (billions)	Share of EU chickens slaughtered 2020 (%)
EU (27)	11,036,941	100.0%	6.42	100.0%
Poland	2,200,280	19.9%	1.18	18.3%
UK	1,784,000	n/a	1.15	n/a
Spain	1,401,410	12.7%	0.70	10.8%
France	1,130,000	10.2%	0.77	12.0%
Italy	1,066,910	9.7%	0.57	8.9%
Germany	1,066,000	9.7%	0.62	9.7%
Netherlands	995,750	9.0%	0.60	9.3%
Belgium	441,300	4.0%	0.30	4.6%
Hungary	354,480	3.2%	0.18	2.8%
Portugal	297,380	2.7%	0.20	3.1%

Table 2. Top 10 broiler chicken producing companies in the EU+UK. Source: Clements (2022)[2].

Company	Country	Broilers slaughtered annually (millions)
LDC	France	579
2 Sisters Food Group	UK	520
Plukon Food Group	Netherlands	468
Gruppo Veronesi	Italy	350
PHW Group	Germany	350
Moy Park Ltd.	UK	312
Amadori	Italy	250
Avara	UK	234
Cedrob	Poland	191
Rothkotter-Unternehmensgruppe	Germany	190

Three of the top 10 broiler chicken producing companies in the EU+UK are in the UK

Chicken meat gross exports from EU countries totalled 3.9 million tonnes, with a value of US$ 7.3 billion, in 2020[1]. In terms of chicken meat gross exports in 2020, the largest exporters in the EU are the Netherlands and Poland (Figure 1). The Netherlands exported 1.2 million tonnes, with a value of US$ 2.3 billion, mainly to Germany (20.8%), the UK (16.5%), the Philippines (9.4%) and France (9.0%). Poland exported 941,000 tonnes, with a value of US$ 1.6 billion, mainly to Germany (14.4%), the Netherlands (10.5%), and the UK (10.4%)[1].

For the UK in 2020, chicken meat gross exports were 378,000 tonnes, with a value of US$ 322 million, making the UK the fourth largest chicken meat exporter in the EU+UK, after the Netherlands, Poland, and Belgium[1]. For the EU as a whole, total extra-EU exports of chicken meat to third countries (excluding the UK) totalled 1.35 million tonnes in 2021, with the main destinations being Ghana (15.9%), Ukraine (11.0%), Democratic Republic of Congo (9.4%), and the Philippines (5.9%)[3].

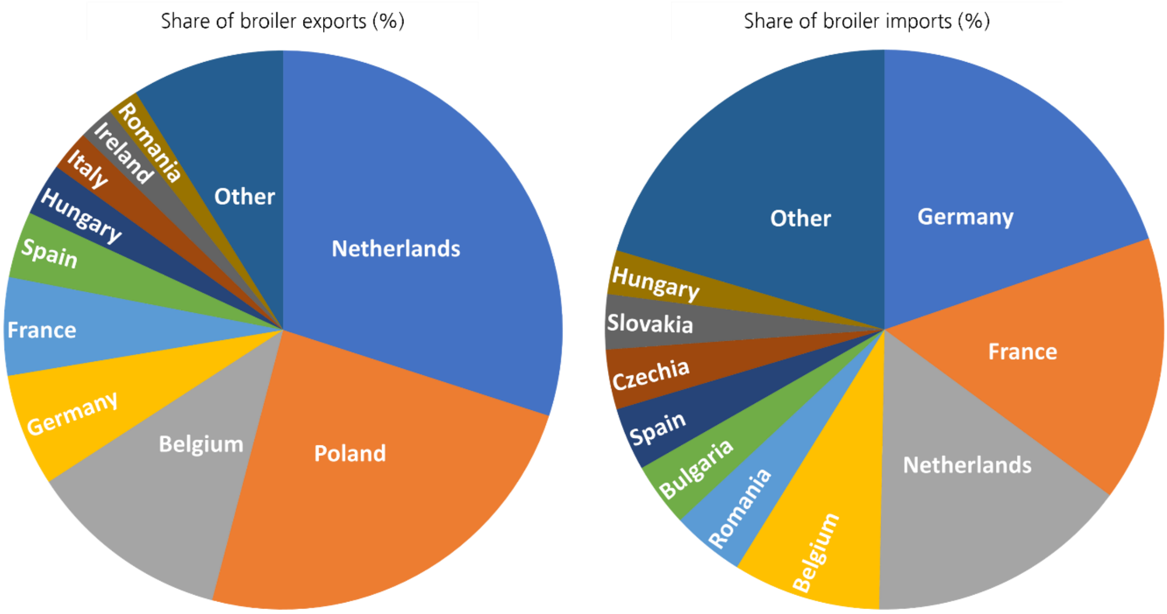

Figure 1. The main EU exporters and importers of chicken meat by share of the market (% of tonnage) 2020. Figures are share of exports from EU countries to any country globally and share of imports to EU countries from any country globally. Total exports from EU countries = 3.9 million tonnes. Total imports from EU countries = 2.4 million tonnes. Source: FAOSTAT.

Chicken meat gross imports to EU countries totalled 2.4 million tonnes, with a value of US$ 5.2 billion, in 2020[1]. In terms of chicken meat gross imports in 2020, the largest importers in the EU are Germany, France, and the Netherlands (Figure 1). Germany imported 471,000 tonnes, with a value of US$ 1.1 billion, mainly from the Netherlands (42.4%) and Poland (24.8%). France imported 367,000 tonnes, with a value of US$ 963.5 million, mainly from Belgium (29.0%), Poland (23.8%) and the Netherlands (21.5%). The Netherlands imported 364,000 tonnes, with a value of US$ 761.5 million, mainly from Germany (18.8%), Poland (17.5%) and Ukraine (15.8%)[1].

For the UK, chicken meat gross imports were 369,000 tonnes, with a value of US$ 1.15 billion in 2020, making the UK the second largest importer of chicken meat in the EU+UK, after Germany[1].

For the EU as a whole, extra-EU imports of chicken meat from third countries (excluding the UK) totalled 483,000 tonnes in 2021, with the main sources being Brazil (50.0%), Thailand (26.6%), and Ukraine (19.1%)[3].

CONSUMPTION

10.6 million tonnes of poultry meat were consumed in the EU in 2019, with an additional 2.3 million tonnes consumed in the UK. The biggest consumers in the EU are Germany, France and Spain (Table 3). Per capita poultry meat consumption is highest in Spain and the UK at 33 kg/cap/yr[1].

Per capita poultry meat consumption has increased by 8% over the past decade across the EU, to around 22 kg/cap/yr, with a wide variation between countries, ranging from >70% growth in Greece to <2% growth in France (Table 3).

Table 3. Poultry meat consumption (measured as total and per capita supply available for human consumption) in the top 10 poultry meat consuming countries in the EU+UK. Source: FAOSTAT[1].

Country	Total domestic supply 2019 (thousand tonnes)	Per capita supply 2019 (kg/cap/yr)	Per capita supply percentage change from 2010 (%)
EU (27)	10,602	22.2	7.7%
UK	2,336	33.1	15.2%
Germany	1,712	18.0	3.6%
France	1,605	23.4	1.5%
Spain	1,571	33.3	21.1%
Italy	1,171	18.8	6.8%
Poland	1,159	28.5	7.1%
Romania	466	23.9	40.0%
Portugal	335	32.7	2.6%
Hungary	311	26.6	14.3%
Greece	269	25.6	71.6%

BROILER CHICKEN PRODUCTION IN DIFFERENT SYSTEMS

Conventional broiler systems used in Europe consist of floor systems with litter. Systems considered to provide higher welfare range from indoor systems with lower stocking densities (≤ 30 kg/m2) and enrichment (perches, pecking substrates, natural light), to free-range and organic systems. As breed and growth rate potential is strongly linked to broiler welfare, higher welfare systems may also use breeds with a slower growth potential. Minimum requirements for higher welfare indoor systems have recently been defined by the European Chicken Commitment[i]. While estimates of production for these systems are not yet available, over 300 leading food companies across Europe are adopting the ECC. In Western Europe, 96.5% of chicken meat production comes from specialised broiler systems, 3.4% from layers and 0.1% from backyard systems;[ii] and in Eastern Europe, 93.6% is from specialised broiler systems, 3.4% from layers, and 2.9% from backyard systems[4].

EU: In the EU, it is estimated that around 90% of broilers are reared in intensive indoor production systems[5], while 5% are reared in less intensive indoor systems, 5% and 1% in free range systems and organic systems respectively[6]. In terms of breed, in 2019 it was estimated that between 2-5% of broilers were from slower growing breeds[6]. Premium concept chicken (of various types but typically incorporating additional welfare requirements) accounted for an estimated 8% of the market across the EU in 2019, and is expected to reach 15-20% of the market by 2025[7].

FRANCE: France has the largest share of outdoor chicken production in Europe. In 2021, standard broiler production represented 67% of chicken production in France, with 15% Label Rouge (free

[i] https://welfarecommitments.com/europeletter/

[ii] FAO defines backyard systems as: Production that is mainly subsistence-driven or for local markets, displaying animal performance lower than in commercial systems and mostly relying on swill and locally-sourced materials to feed animals (less than 20 percent of purchased concentrate).

range, slower-growing), 7% chickens reared specifically for the export market, 7% CCP (Certificat de conformité produit: indoors, slower growing breeds with a minimum slaughter age of 56 days), and 2% organic[8]. A quarter (24%) of broiler chicken production in France is from slower-growing breeds[5].

NETHERLANDS: The Netherlands has the highest share of chicken production from slower-growing breeds in Europe. Slower-growing chickens account for 40% of production (and 100% of the fresh retail market) in the Netherlands[5].

UK: Free-range (excluding organic) chicken accounts for around 13% of the retail market and 3-4% of the total market in the UK[9]. 11% of chicken production in the UK is from slower-growing breeds[5].

LEGISLATION

In the EU, the welfare of broilers during rearing is covered by Council Directive 2007/43/EC[iii] which sets down the minimum rules for the protection of chickens kept for meat production, while poultry production systems and how they can be marketed are determined by COMMISSION REGULATION (EC) No 543/2008[iv]. Key features of these are summarised in Table 4.

Similar requirements for broiler chickens in the UK are set out in the Poultrymeat Marketing Standards and The Welfare of Farmed Animals (England) Regulations 2007 (as amended, and related Regulations in other parts of the UK). However, the derogation allowing conventionally reared broiler chickens to be stocked at up to 42 kg/m^2 is not available in the UK so the highest stocking density permitted in conventional systems in the UK is 39 kg/m^2.

Table 4. Overview of EU legal requirements for various broiler chicken production systems/marketing terms.

LEGISLATION	COUNCIL DIRECTIVE 2007/43/EC (AS AMENDED)	COMMISSION REGULATION (EC) NO 543/2008 (AS AMENDED)			REGULATION (EU) 2018/848 (AS AMENDED); COMMISSION IMPLEMENTING REGULATION (EU) 2020/464 (AS AMENDED)
PRODUCTION SYSTEMS / MARKETING TERMS	**STANDARD FLOCKS WITH ≥500 BIRDS**	**EXTENSIVE INDOOR/ BARN-REARED**	**FREE RANGE**	**TRADITIONAL FREE RANGE[v]**	**ORGANIC**
Minimum slaughter age	No	56 days	56 days	81 days and must use slow-growing strain	81 days or slow-growing strain must be used
Maximum stocking density	33kg/m^2, or 39kg/m^2 if meet certain standards for air quality, temperature and humidity, or 42kg/m^2 if also maintain	15 birds/m^2 and 25kg/m^2	13 birds/m^2 and 27.5kg/m^2	12 birds/m^2 and 25kg/m^2 (or 20 birds/m^2 and 40kg/m^2 in small mobile houses <150m^2 that	21kg/m^2 usable area (or 30kg/m^2 in small mobile houses <150m^2)

[iii] https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:32007L0043
[iv] https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:32008R0543&qid=1696608132614
[v] 'Free range – total freedom' has similar standards to 'Traditional free range' except that birds must have continuous daytime access to open-air runs of unlimited area.

	cumulative daily mortality below 1+0.06% x slaughter age in days over 7 flocks and no deficiencies identified within last 2 years			remain open at night)	
Outdoor access	No	No	Yes, at least half of life; 1m²/bird	Yes, from 6 weeks; 2m²/bird	Yes, from as early an age as practically possible and at least one third of life; 4m²/bird (or 2.5m²/bird for mobile houses)
Environmental enrichment	Birds must have permanent access to litter over the usable floor area, which must be dry and friable on the surface	Birds must have permanent access to litter over the usable floor area, which must be dry and friable on the surface	Outdoor area must be mostly covered with vegetation	Outdoor area must be mostly covered with vegetation	At least one third of floor must be littered; perches (minimum 5cm/bird or 25cm² raised sitting level/bird); outdoor area must be mostly covered with vegetation and have shelters or trees/bushes distributed over whole area.
Lighting	Minimum 20 lux over 80% of usable area; minimum 6 hours darkness in 24 hours (including 4 hours continuous)	Not specified	Not specified	Not specified	Natural light may be supplemented with artificial light up to 16 hours/day; minimum 8 hours continuous nocturnal rest period without artificial light

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