

British Poultry: Food led Sustainability

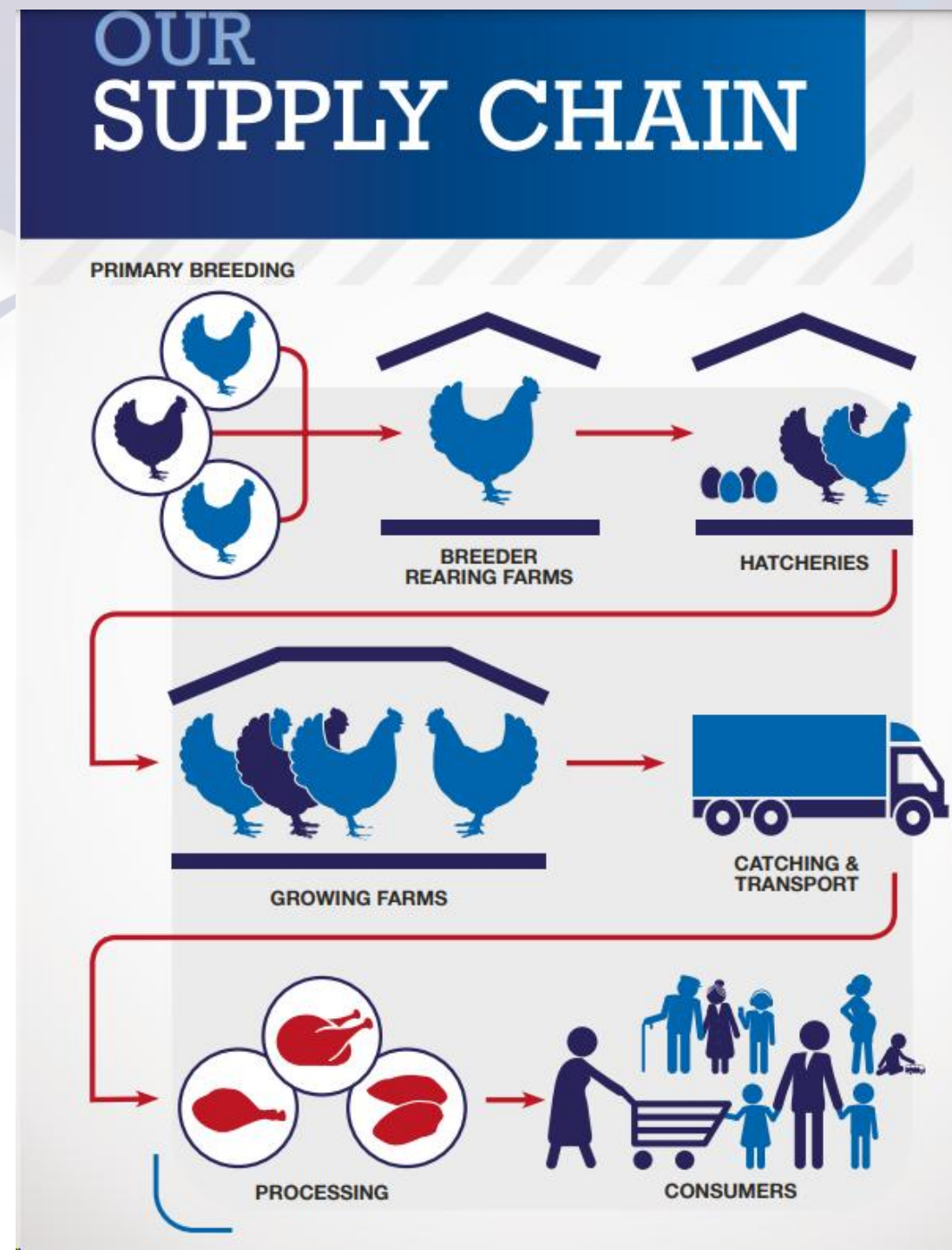
BVPA Spring Meeting 14th March 2024

Máire Burnett, Technical Director, British Poultry

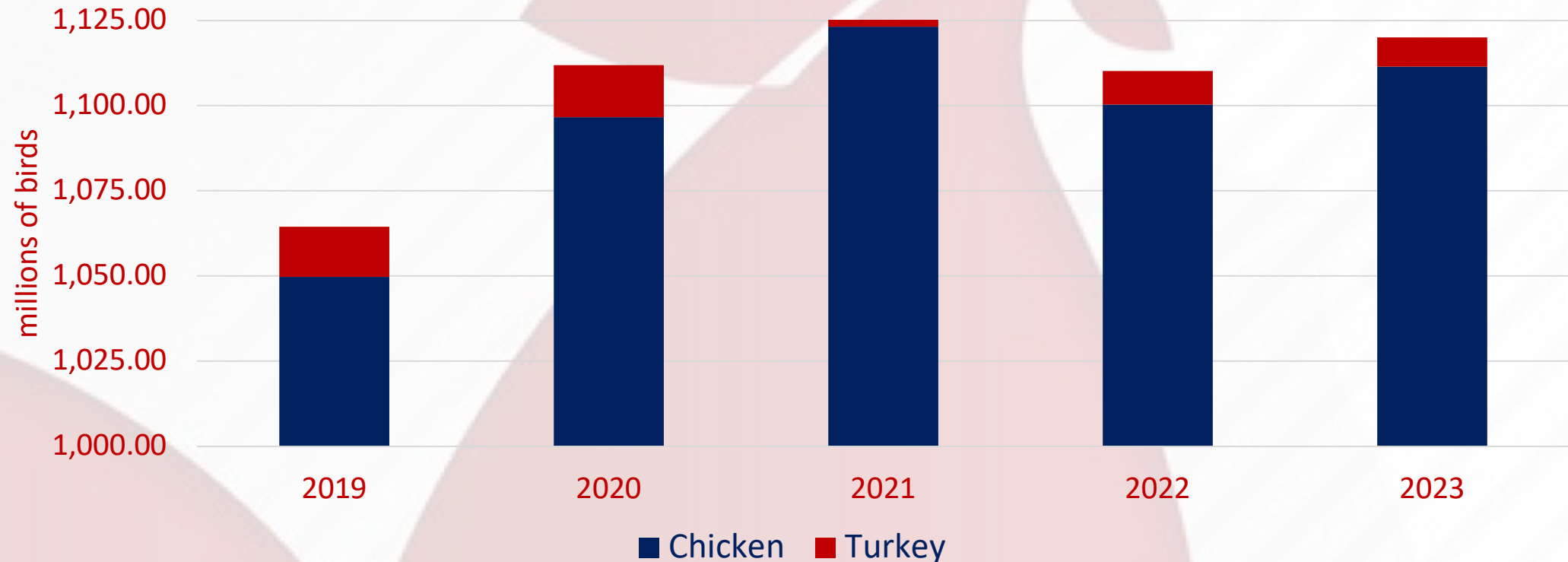


Overview of the poultry meat (chicken, turkey, duck) sector

- Highly integrated system
- Short supply chain
- Full traceability from farm to fork
- Receives no government subsidies
- Employs ~40,000 people

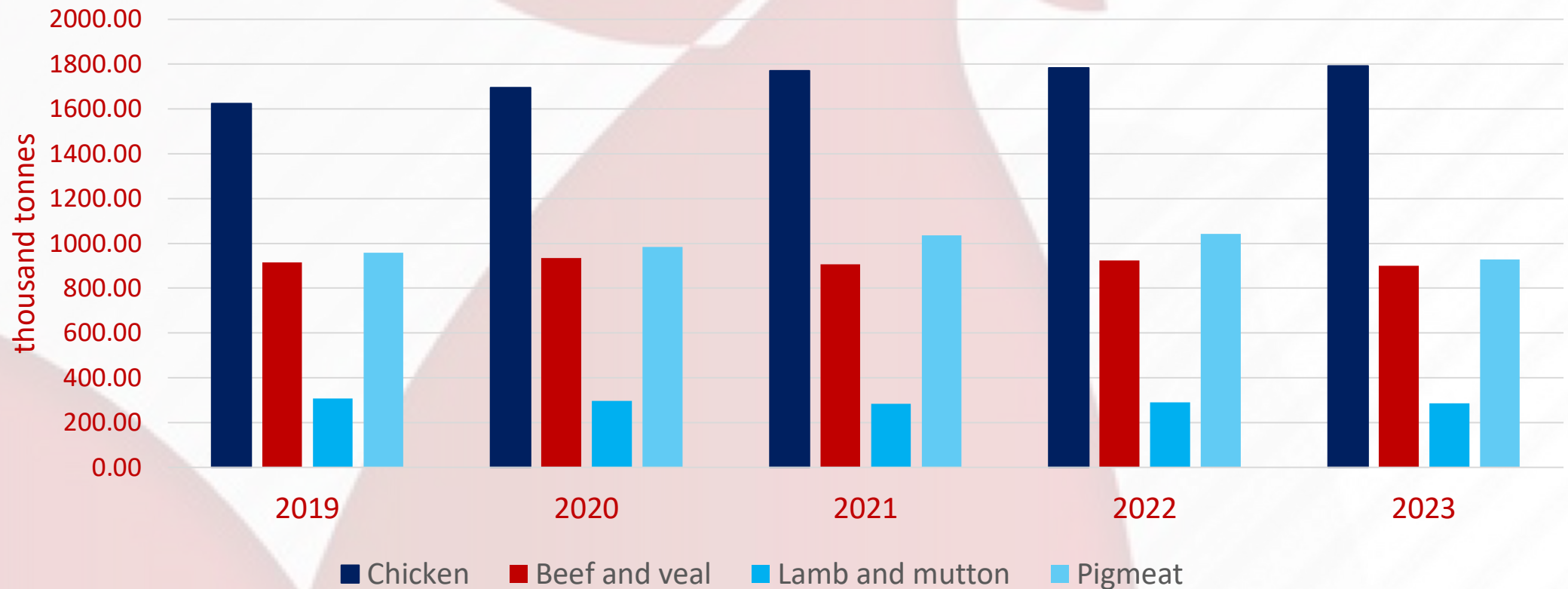


UK Poultry Meat Production 2019-2023 (millions of birds)



Source: BPC from Defra poultry statistics. No published duck figures

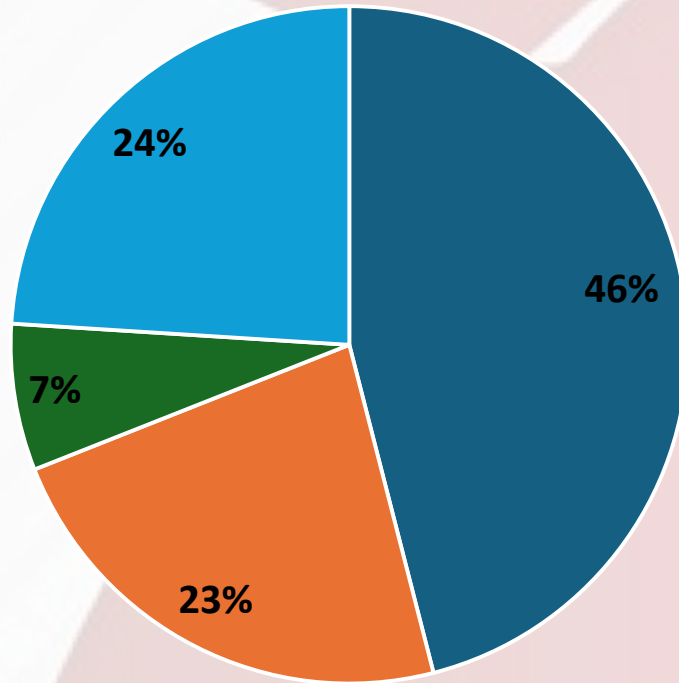
UK Meat Production 2019-2023 (000 tonnes) carcass weight



Source: BPC from Defra poultry statistics

UK Protein Production

% share of the UK meat production market

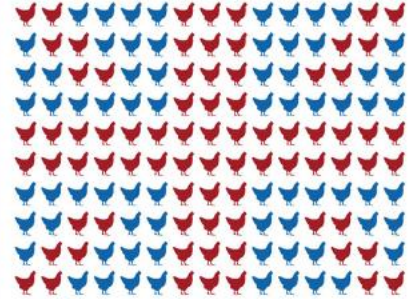


■ Chicken ■ Beef and veal ■ Lamb and mutton ■ Pigmeat

Source: BPC from Defra statistics

**POULTRY IS
HALF THE MEAT
EATEN IN THIS
COUNTRY**
...AND GROWING

**A BILLION
BIRDS EVERY YEAR**



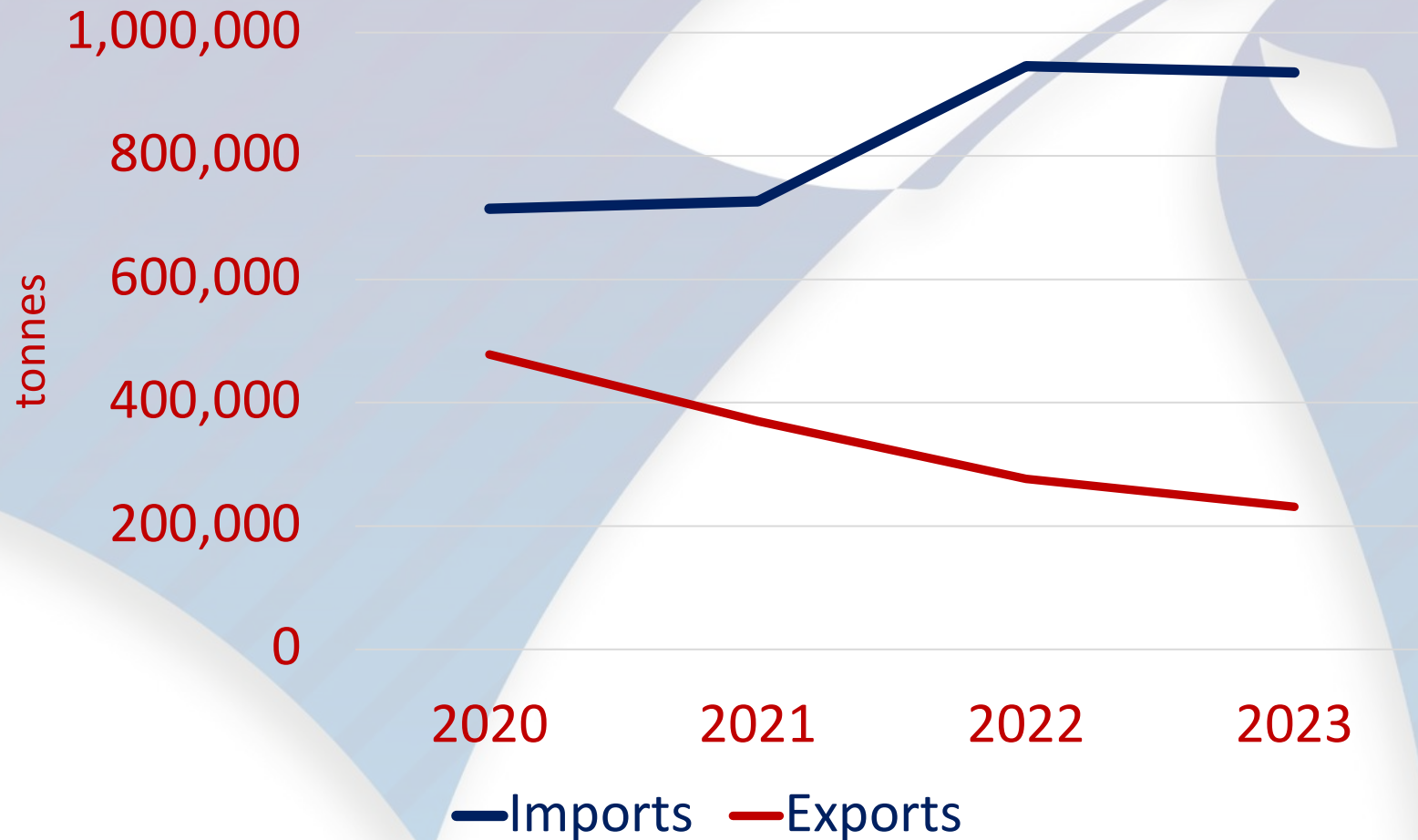
**TAX CONTRIBUTION
TO THE EXCHEQUER
OVER £1.5 BILLION
PER YEAR**

**GVA CONTRIBUTION
£6.5 BILLION
PER YEAR**

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Poultry Meat Imports & Exports



~65% self sufficient

Imports: predominantly chicken breast meat

Exports: ie wings, necks, drums, backs, quarters, offal, paws

Sustainable UK Poultry Meat Production

- Demand for affordable poultry meat is expected to grow to meet demand for affordable, nutritious source of protein
- The sector operates in a consumer driven market.
- We meet demand by providing different products, reared across a variety of production systems, at a wide range of price points.
- Systems such as slow growing, free range and organic come at a cost economically and in terms of production inputs, hence there is less consumer demand for these products.

Sustainable UK Poultry Meat Production

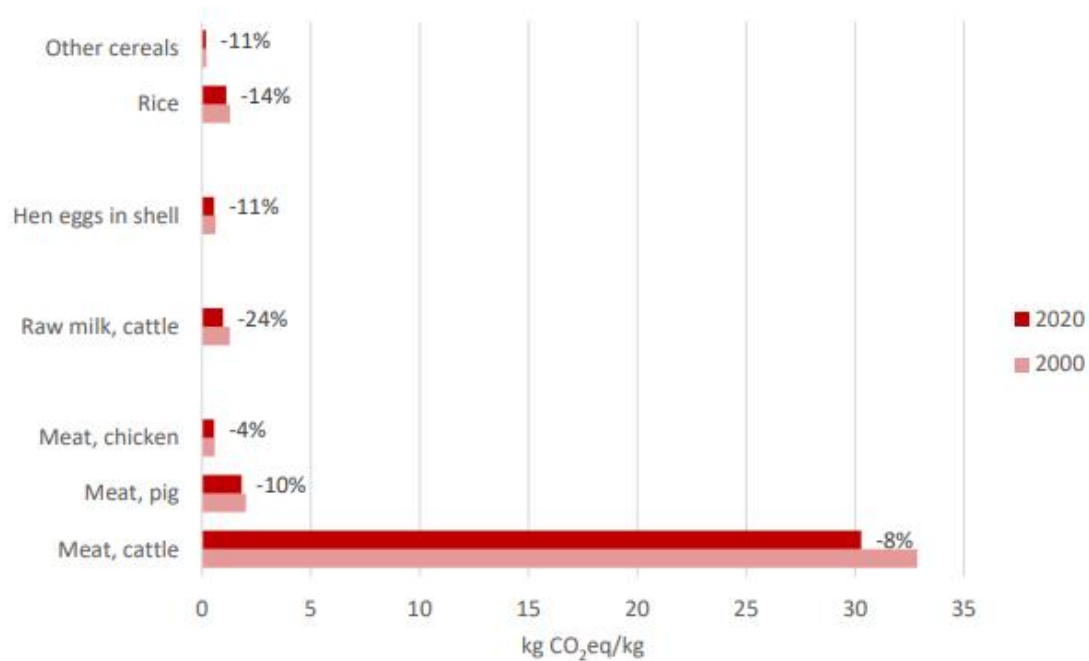
- The sector is proud of its high standards of welfare and continue to drive improvements
- Under Red Tractor Assurance producers go beyond the UK regulatory baseline (eg windows, lower max stocking density for broilers, enrichment)
- Low users of antibiotics (reduced our usage by 80% since 2012)
- Safeguarding the efficacy of antibiotics by restricting use of critically important antibiotics (ie fluroquinolones, macrolides)

Sustainable UK Poultry Meat Production

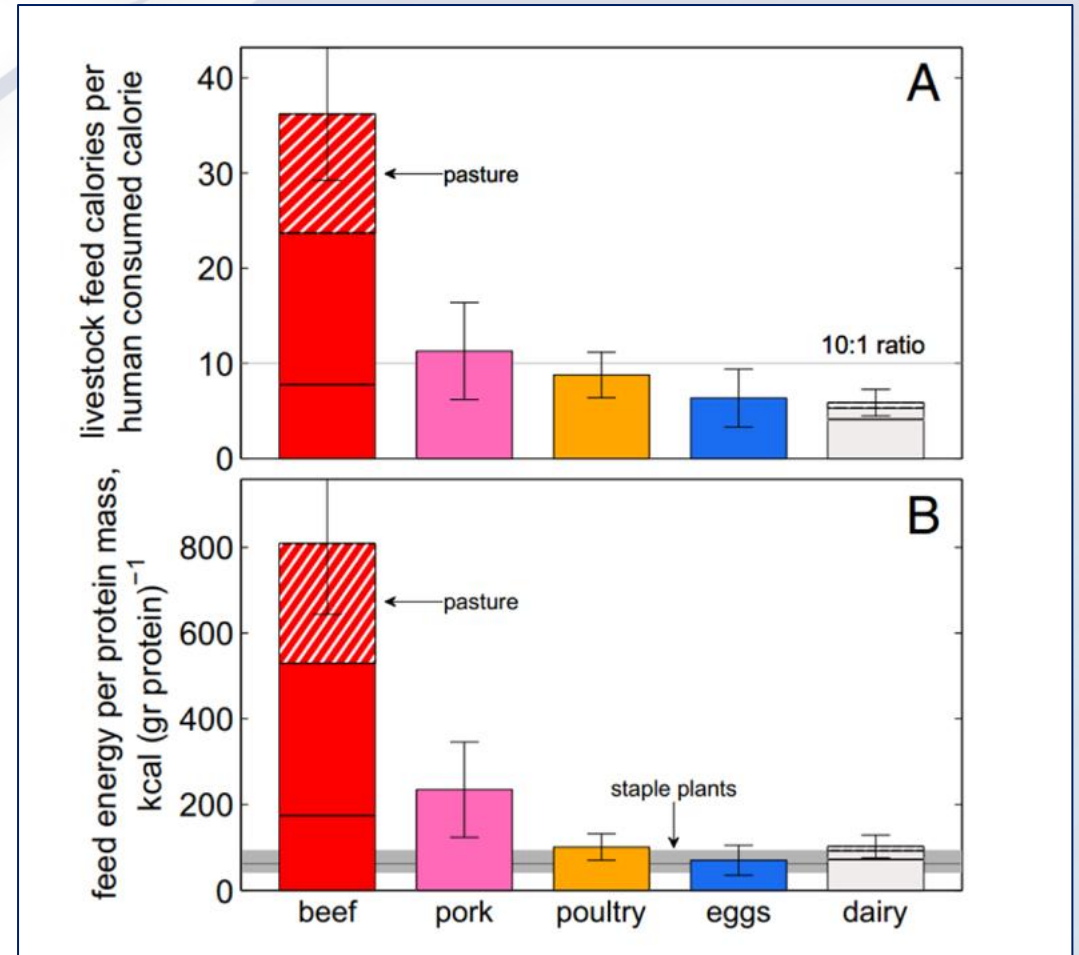
- Standard poultry meat production represents over 70% of the market
- Growth in slow growing broilers – European Chicken Commitment
- Move towards lower stocking density (30kg using conventional breeds)
- Breakdown by production type:
 - 71% standard indoor Red Tractor to 38kg/m²
 - 25% indoor reared to 30kg/m²
 - 3% free range
 - >1% organic
- Increased demand for housing

Environment Impact of Poultry

Figure 3: Global emissions intensities (2020) and percentage change since 2000



Source: FAO. 2022. Emissions intensities. In: FAO. Rome. Cited October 2022
<https://www.fao.org/faostat/en/#data/EI>

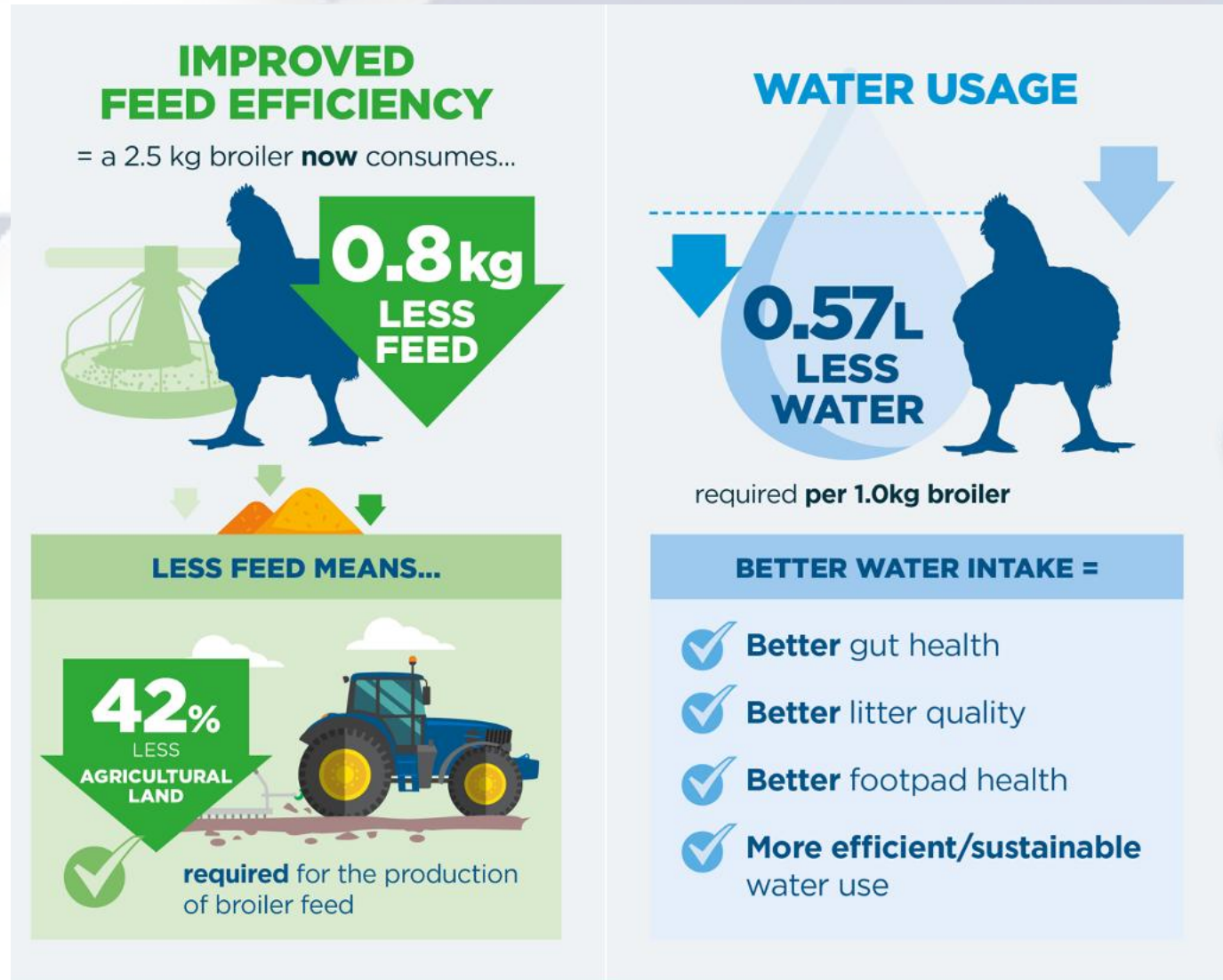


- The environmental cost per consumed calorie is lower for chicken compared to other forms of meat when considering resource usage (land and water) and harmful emissions (greenhouse gas and nitrogen) (e.g. Eschel et al., 2014).

Genetic Improvements in last 20 years

The modern broiler is more efficient than 20 years ago while

- Improving liveability
- Improving health
- Improving welfare



Moving to a 50g/day bird means Destroying years of sustainability progress



Using a 50g/day bird means a step back of more than 20 years of environmental and economic sustainability

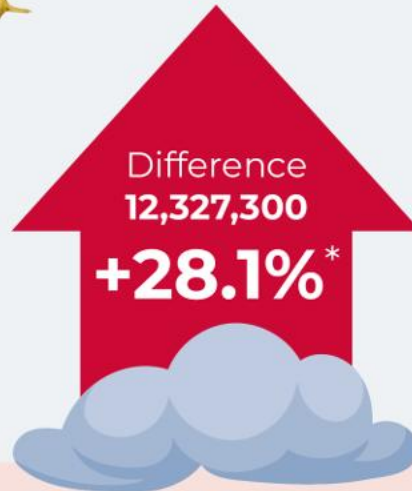
CO₂ EMISSIONS



Ranger Classic (50g/d)
↑ 56,157,700 tonnes



Ross 308
 43,830,400 tonnes



Emissions would increase by 12,327,300 tonnes of CO₂

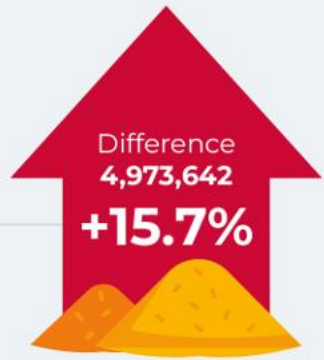
FEED



Ranger Classic (50g/d)
↑ 36,734,661



Ross 308
 31,761,019



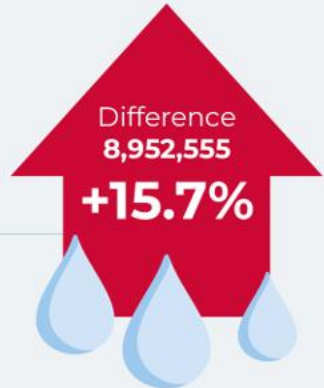
WATER



Ranger Classic (50g/d)
↑ 66,122,390



Ross 308
 57,169,835



HOUSES



Ranger Classic (50g/d)
↑ 51,670



Ross 308
 43,877



It would require building an additional 7,938 houses in EU

*Leinonen, 2023 – personal communication

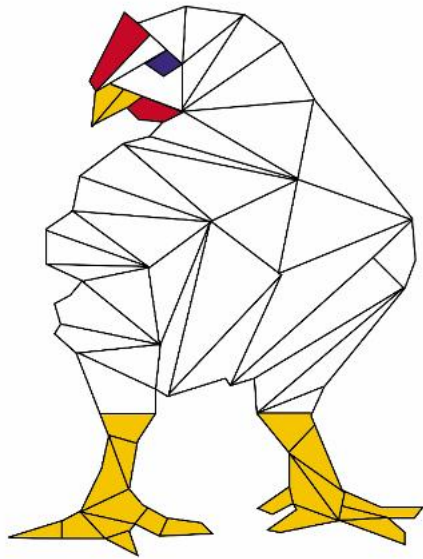
Based on Resource Requirement – Housing – EU27 (total output 13,697,000 Tonnes broiler meat per year).

Sustainable sourcing of Soy/Alternative Proteins

- New EU Deforestation Regulations (2025)
- New UK regs – Forest Commodities Regulations (2025)
- Alternative Proteins
 - PAP
 - Insect Feed

Challenges facing Sustainability of the Poultry Meat Sector

- UK regulatory reforms
 - Disease
 - Adapting to climate change
 - Trade deals
 - Confidence in the sector
 - NGO Pressure
- 



BroilerNet.



BroilerNet is a four-year project funded by the Horizon Europe research and innovation programme. BroilerNet aims to enhance the resilience and sustainability of the European broiler sector by creating space for interaction between science and practice and the co-creation of ready to use innovative practices on broiler farms in Europe.

European exchange to enhance the **resilience** and **sustainability** of the **broiler** sector

broilernet.eu/



This project has received funding from the European Union's Horizon Europe programme under grant agreement No 101060979



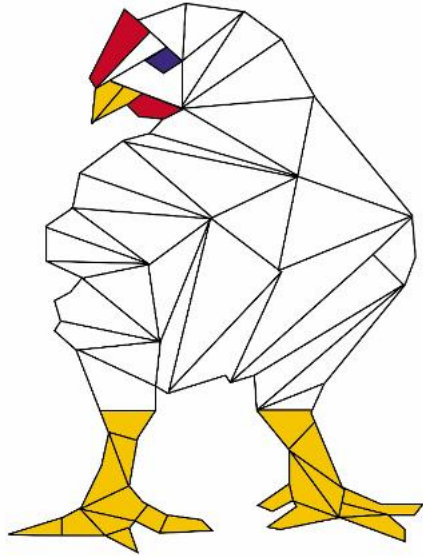
BroilerNet Project Partners



This project has received funding from the European Union's Horizon Europe programme under grant agreement No 101060979

The image displays a grid of logos for the BroilerNet project partners. The logos are arranged in several rows and columns. Some logos are highlighted with green ovals, including the 'f' logo, the British Poultry Council, the 'U LISBOA' logo, the 'f' logo with 'RA' inside, and the 'eagasc' logo. The logos include:

- ancave
- anses
- CRPA
- IRTA
- PZZHIPD
- TERREN
- BRITISH POULTRY COUNCIL
- CRPA
- BVH
- SGGW
- ITTO
- CRPA
- FRIEDRICH-LOEFFLER-INSTITUT | FLI | Bundesforschungsinstitut für Tiergesundheit | Federal Research Institute for Animal Health
- UNIVERSIDADE DE LISBOA
- FACULDADE DE MEDICINA VETERINARIA
- una'italia
- U LISBOA
- TERRENA
- GALLIANCE
- Royal Agricultural University
- eagasc
- Dravchevoen
- Pindos
- SLU
- WAGENINGEN UNIVERSITY & RESEARCH
- SVENSK FÅGEL
- TERRENA
- ELGO - DIMITRA HELLENIC AGRICULTURAL ORGANIZATION - DIMITRA



BroilerNet.



In addition to the **UK Broiler Innovation Network**

13 national networks across Europe:

- Ireland
- Portugal
- Spain
- France
- Netherlands
- Poland
- Germany
- Sweden
- Finland
- Slovenia
- Italy
- Greece



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Aims

- To **bring together relevant people** & organisations within each country's broiler sector
- To **discuss current challenges** facing the industry
- To **identify and explore Good Practice** in response to the sector's challenges



Top 5 Good Practices - Health

Final results of Top 5 GPs and the champions

Improving Biosecurity

- Greece: Fence around the farm
- Greece: Water disinfection
- Portugal: Create sanitary barriers – changing rooms, visits restricted to minimum
- France: Dedicating small equipment by zone and house (colour coded)
- Spain: Perimeter paving of the broiler house



Fighting Avian Influenza

- Greece: Early involvement of vets at possible symptoms
- Germany: Self analysis for AI risk factors
- Spain: Disinfection after HPAI focus
- France: Biosecurity of catching teams and machines
- France: Indoor euthanasia for depopulation using whole-house gassing



Reducing use of Antimicrobials

- Netherlands: Feeding whole wheat
- Finland: Water circulation central heating with renewable energy
- Netherlands: Vaccination instead of anticoccidials
- Finland: All in, all out – no thinning
- Poland: Using phytobiotic feeding supplement



Top 5 Good Practices - Welfare

Final results of Top 5 GPs and the champions

Farmer training

Germany	Online training for ITW certificate
Italy	Mandatory training course for broiler growers
Greece	Farmer training on Microclimate management
Spain	Internal audits regarding on-farm euthanasia
France	Farmer Exchange groups



Genetics/Breeding

Greece	Communicate welfare issues to genetic vendors
Spain	Elevated platforms as enrichment material
France	Select for increased resistance
France	Consider indicators of intestinal flora
Spain	Sexing during partial depopulation



Barn climate

Greece	Smart Farm Monitoring
Sweden	Foot Health Program
Portugal	Farm environmental data monitoring, control and alarm systems
France	Misting
Greece	Remote technologies for farm welfare monitoring



Top 5 Good Practices - Environment

Final results of Top 5 GPs and the champions

C neutrality / environmental footprint

Italy	Transfer of spent litter to produce fertiliser
Germany	Manure emission reduction through biogas system
France	Harmonized and recognized measurement method: CAP'2ER
Italy	Transfer of spent litter to biogas plant
Greece	Advanced natural microclimate



Feed sources and feed quality

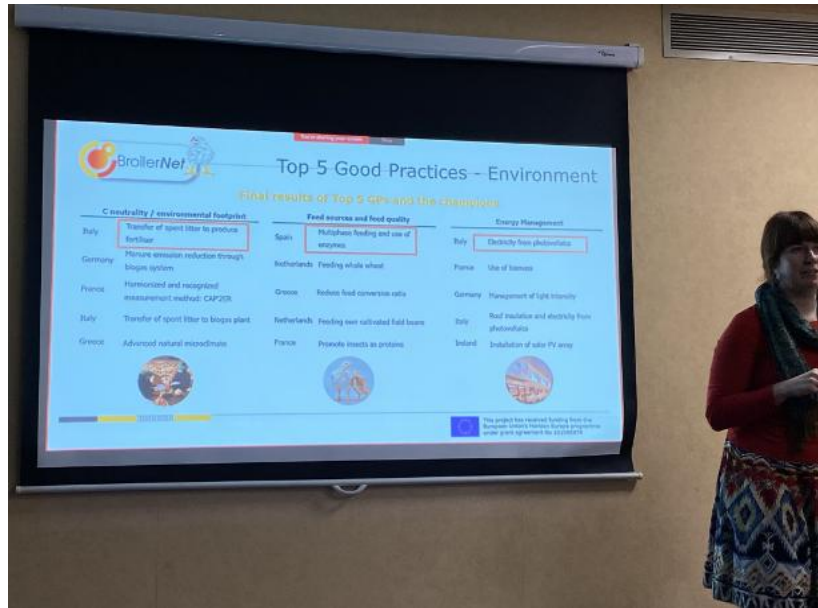
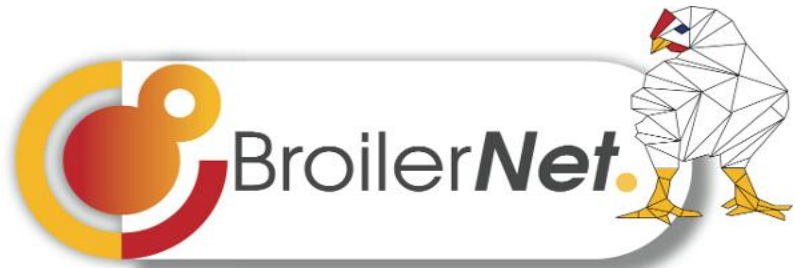
Spain	Multiphase feeding and use of enzymes
Netherlands	Feeding whole wheat
Greece	Reduce feed conversion ratio
Netherlands	Feeding own cultivated field beans
France	Promote insects as proteins



Energy Management

Italy	Electricity from photovoltaics
France	Use of biomass
Germany	Management of light intensity
Italy	Roof insulation and electricity from photovoltaics
Ireland	Installation of solar PV array





UK BIN Meeting 2024

Summary

- Producing half the meat the nation eats, British poultry is the cornerstone of our food security.
- The sector is shaping a system that feeds people, tackles inequalities with safe and affordable food, and reducing inputs and impacts to promote a liveable climate for all.
- We are supportive of Government decision-making that is informed and science-based, striking the right balance to conserve the environment, bolster welfare and produce poultry people trust and value.

02

KEEP FOOD MOVING:
TRADE THAT THRIVES ACROSS
ECONOMIC, SOCIAL, AND
ENVIRONMENTAL DIMENSIONS

01

**DOING THE RIGHT THING
THE RIGHT WAY:**
SAFE, AFFORDABLE, LOW
IMPACT BRITISH POULTRY
AS FOOD SECURITY

04

**TRUSTED AND VALUED
SUPPLY CHAINS:**
PRIDE IN OUR WORLD
CLASS STANDARDS OF BIRD
HEALTH AND WELFARE



2024
& BEYOND



05

**SKILLS AS CURRENCY
FOR OPPORTUNITY:**
A WORKFORCE WITH
CLEAR PURPOSE SECURES
GOOD OUTCOMES

03

**RESILIENCE, PROGRESS,
AND COLLABORATION:**
AVIAN INFLUENZA
MUST NOT COMPROMISE
BUSINESS CONTINUITY

Thank you for listening

@britishpoultry
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