



Agriculture & Horticulture  
DEVELOPMENT BOARD

# Poultry Pocketbook 2013





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# Poultry Pocketbook

## 2013

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## Chapter 1 – Marketing chain

Table 1.1 UK poultry meat supply balance

'000 tonnes	2009	2010	2011	2012
Production	1,457	1,538	1,558	1,609
Imports	610	673	735	696
Exports	283	300	330	320
Total consumption	1,784	1,911	1,963	1,986
Self-sufficiency (%)	82	80	79	81

Offals included in production, trade and consumption

All data is in carcase weight equivalent

Source: Defra, GTIS/HMRC, AHDB Market Intelligence

Table 1.2 UK eggs supply balance

million dozen	2007	2008	2009	2010	2011*
Production (for human consumption)	720	754	751	826	821
of which: sold in shell	539	577	597	673	664
processed	181	177	154	152	158
Imports (a)	205	220	225	215	195
Exports (b)	17	24	19	21	22
Total consumption	908	950	957	1,020	994
Self-sufficiency (%)	79	79	78	81	83

(a) Includes shell egg equivalent of whole egg (dried, frozen and liquid), egg yolk and albumen

(b) Includes hatching eggs for export and waste

\* Provisional

Source: Defra

Table 1.3 EU poultry meat supply balance

'000 tonnes	2008	2009	2010	2011	2012 (p)
Indigenous production	11,631	11,649	11,901	12,064	12,159
Imports	864	848	783	820	819
Exports	911	937	1,157	1,296	1,332
Total consumption	11,585	11,560	11,526	11,588	11,646
Self-sufficiency (%)	100	101	103	104	104

Offals included in production, trade and consumption

(p) Provisional

Source: EU Commission

Table 1.4 EU egg supply balance

'000 tonnes	2008	2009	2010	2011	2012 (p)
Gross indigenous production	7,485	7,313	7,297	7,298	7,306
Imports	24	32	33	20	35
Exports	187	150	182	217	185
Eggs for hatching	810	863	880	869	1,033
Human consumption	6,512	6,331	6,268	6,231	6,123
Self-sufficiency (%)	102	102	102	103	102

All data is in whole egg equivalent

(p) Provisional

Source: EU Commission

## Chapter 2 – Poultry numbers

Table 2.1 UK poultry numbers, June survey

million head (a)	2009	2010	2011	2012
Total poultry	153	164	163	160
Total breeding and laying fowl	43	47	49	47
of which:				
Hens and pullets laying eggs for eating	33	37	38	37
Total breeding flock	9	10	10	10
Table chickens (broilers)	99	105	102	103
Other poultry	11	11	11	11
of which:				
Turkeys	n/a	4	4	4

(a) Due to production cycles, subgroups within the poultry population are often volatile as the 'point in time' nature of the June Survey can lead to large variations in the numbers in each category

Source: Defra

Table 2.2 UK chick and poult placings

million head	2008	2009	2010 (a)	2011	2012
Commercial broilers	828	844	904	896	918
Commercial layers	31	34	34	32	35
Turkeys (b)	17	16	16	17	18
Female broiler breeders	7	7	6	7	7

(a) 53-week statistical year

(b) Includes female breeder poult but not male breeder poults

Source: Defra

## Chapter 3 – Slaughterings and production

Table 3.1 UK poultry slaughterings

million head	Broilers	Boiling fowl	Turkeys
2000	760	38	27
2001	782	37	26
2002	782	37	23
2003	804	37	22
2004 (a)	806	36	21
2005	827	37	19
2006	813	36	18
2007	805	37	16
2008	792	39	16
2009	799	40	15
2010 (a)	863	41	16
2011	855	44	17
2012	873	46	18

(a) 53-week statistical year

Source: Defra

Table 3.2 UK poultry meat production (a)

'000 tonnes	Broilers	Boiling fowl	Turkey	Ducks	Total
2000	1,163	51	264	41	1,519
2001	1,211	50	260	48	1,569
2002	1,222	51	238	43	1,554
2003	1,245	51	215	43	1,554
2004 (b)	1,246	49	207	39	1,541
2005	1,282	51	192	42	1,567
2006	1,237	53	178	41	1,509
2007	1,212	52	165	36	1,465
2008	1,214	56	160	33	1,463
2009	1,220	50	157	30	1,457
2010 (b)	1,323	53	162	30	1,568
2011	1,297	56	171	33	1,557
2012	1,323	59	197	32	1,611

(a) Excludes other bird types, eg geese

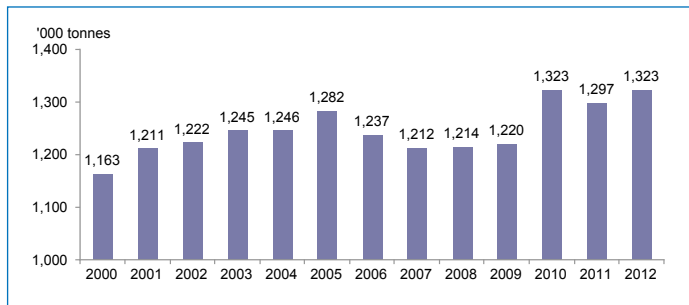
(b) 53-week statistical year

Boiling fowl includes spent commercial layer hens, spent layer breeders and spent broiler breeders

Source: Defra

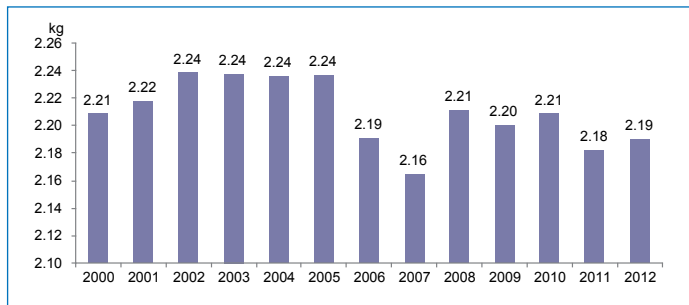


Figure 3.1 UK broiler meat production



Source: Defra

Figure 3.2 Average liveweight of broilers in England and Wales



Source: Defra

**Table 3.3 UK egg packing station throughput**

'000 cases	Total	Intensive	Barn	Free range	Organic
2000	22,460	16,187	1,675	4,598	N/A
2001	23,943	16,856	1,648	5,439	N/A
2002	23,772	16,475	1,624	5,672	N/A
2003	23,395	16,222	1,514	5,659	N/A
2004	24,715	16,213	1,764	6,739	N/A
2005	24,584	15,558	1,564	7,462	N/A
2006	24,021	15,053	1,229	6,541	1,198
2007	23,537	14,544	937	6,692	1,363
2008	24,680	14,395	926	8,000	1,359
2009	24,616	13,445	1,035	9,137	999
2010	27,067	13,522	1,334	11,283	928
2011	26,921	13,128	1,075	11,879	838
2012	25,922	12,597	946	11,717	662

1 case = 360 eggs

N/A = Not available

Source: Defra

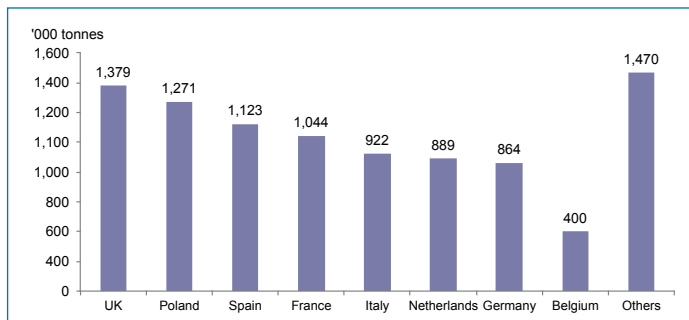
**Table 3.4 UK production of egg products by processors**

tonnes	Liquid egg	Hard boiled	Other	Total
2000	75,022	N/A	16,756	91,778
2001	75,564	N/A	16,685	92,248
2002	72,135	N/A	14,846	86,981
2003	77,786	N/A	16,710	94,496
2004	80,463	N/A	17,043	97,506
2005	78,066	28,649	13,630	120,345
2006	72,786	31,663	9,065	113,514
2007	75,027	28,002	2,590	105,619
2008	73,502		30,490	103,991
2009	63,442		30,282	93,724
2010	64,459		33,188	97,648
2011	67,908		32,518	100,426
2012	66,439		24,499	90,937

N/A = Not available

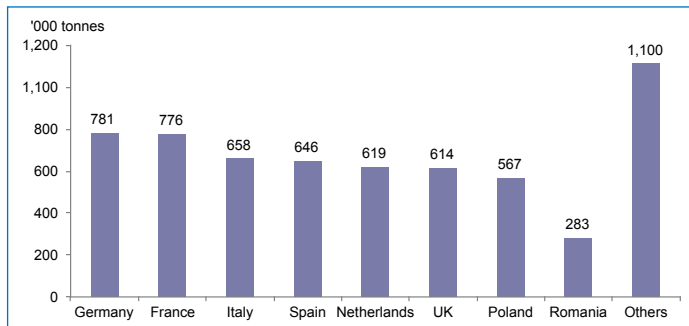
Source: Defra

Figure 3.3 EU chicken meat production, 2012



Source: Eurostat

Figure 3.4 EU egg production, 2012



Source: EU Commission

## Chapter 4 – Poultry and egg prices

Table 4.1 Average UK poultry producer prices

pence per kg carcase weight	2007	2008	2009	2010	2011
Chickens and other table fowls	77	98	101	104	111
Boiling fowls (culled hens)	10	10	9	9	10
Turkeys	122	135	144	145	156
Ducks	177	205	218	250	263
Geese	499	615	555	589	617

Source: Defra

Table 4.2 Average UK egg packer price paid to producers

pence per dozen	All	Intensive	Barn	Free range	Organic
2000	40	32.3	48.6	62.3	N/A
2001	41	34.5	46.6	59.7	N/A
2002	42	35.0	50.1	61.5	N/A
2003	46	38.8	56.9	65.0	N/A
2004	49	39.3	57.6	71.0	N/A
2005	46	34.4	52.0	67.9	N/A
2006	50	37.1	51.5	67.9	N/A
2007	59	43.3	55.8	77.8	N/A
2008	71	52.8	70.6	89.8	N/A
2009	73	55.4	72.7	90.2	N/A
2010	70	53.6	72.2	84.4	135.5
2011	70	53.9	72.6	83.1	131.6
2012	86	72.2	c	97.6	c

1 case = 360 eggs

This data represents all Class A eggs passed over a grader, including seconds.

Prices exclude bonuses.

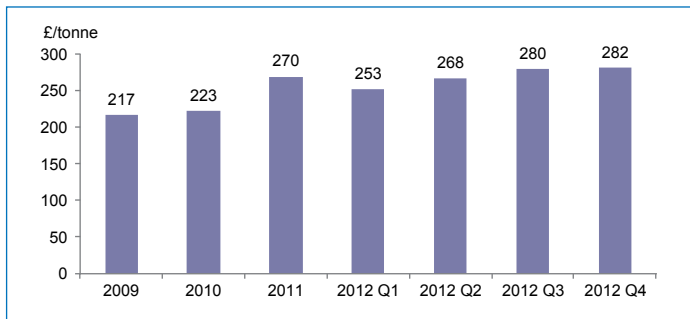
From Q1 2006 the average UK "All" types price includes organic eggs.

c = Confidential

N/A = Not available

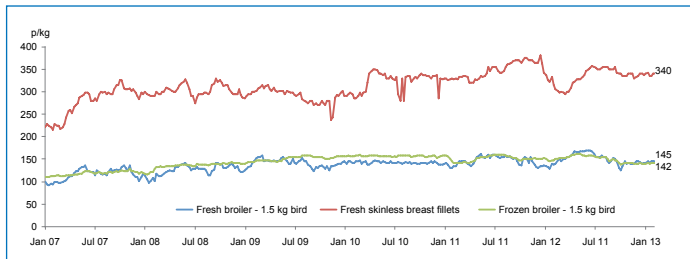
Source: Defra

Figure 4.1 Average poultry compound feed price, GB



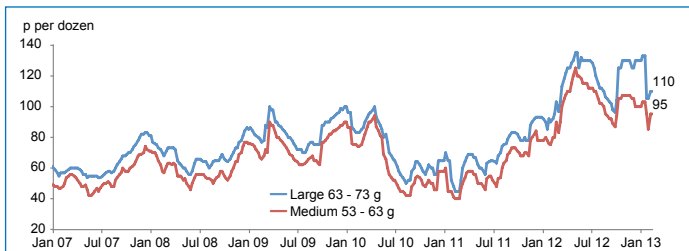
Source: Defra

Figure 4.2 UK wholesale chicken prices



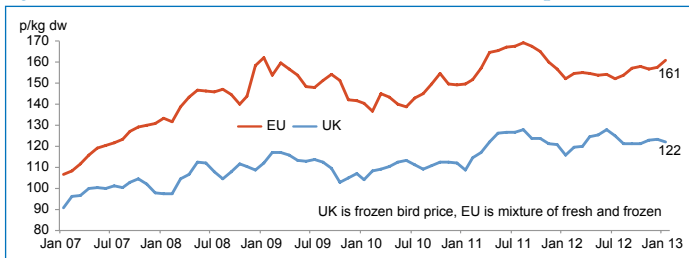
Source: Defra/London wholesale market

### Figure 4.3 UK wholesale hens' egg prices



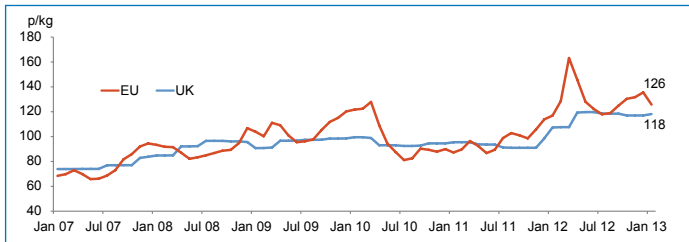
Source: Defra/London wholesale market

### Figure 4.4 EU and UK broiler (65%) meat wholesale market price



Source: EU Commission

### Figure 4.5 EU and UK egg (large and medium) wholesale market price



Source: EU Commission

## Chapter 5 – Imports and exports

Table 5.1 UK egg trade by volume

'000 cases	2008	2009	2010	2011	2012 (e)
<b>Imports</b>					
Shell eggs (a)	4,372	4,657	4,171	3,713	5,590
Egg products	2,969	2,843	2,987	2,815	3,174
Total	7,341	7,500	7,158	6,528	8,764
<b>Exports</b>					
Shell eggs (a)	614	434	568	644	994
Egg products	191	182	127	137	443
Total	805	616	695	781	1,437

1 case = 360 eggs

The data is based on the following Standard Industrial Trade Classifications (SITCs): 025.21, 025.22 and 025.30.

(a) From 2012, Shell eggs SITC code changed from 04070030 to 040721000, 040729100 and 040790100. All data is converted to shell egg equivalent.

(e) Estimate

Source: Defra

Table 5.2 Volume and value of UK poultry meat imports

Tonnes, product weight	2008	2009	2010	2011	2012
Fresh/frozen poultry (inc offals)	334,017	338,278	378,926	412,368	380,256
Salted poultry	23,883	33,542	36,111	47,508	43,439
Processed poultry	248,184	240,424	254,079	278,732	292,525
Total	606,084	612,244	669,116	738,608	716,220
<b>Value, £'000</b>					
Fresh/frozen poultry (inc offals)	780,719	849,526	945,617	1,078,530	931,138
Salted poultry	41,187	61,119	72,630	102,571	85,009
Processed poultry	601,017	623,543	684,074	797,679	803,285
Total	1,422,922	1,534,188	1,702,321	1,978,780	1,819,432

Source: GTIS, HM Revenue and Customs

**Table 5.3 Volume and value of UK poultry meat exports**

<b>Tonnes, product weight</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
Fresh/frozen poultry (inc offals)	278,284	258,008	270,450	295,241	288,934
Salted poultry	3,388	4,346	5,145	3,971	2,939
Processed poultry	45,529	38,254	38,341	45,511	45,791
<b>Total</b>	<b>327,201</b>	<b>300,608</b>	<b>313,936</b>	<b>344,723</b>	<b>337,664</b>
<b>Value, £'000</b>					
Fresh/frozen poultry (inc offals)	217,472	231,054	260,864	306,725	272,894
Salted poultry	7,353	7,071	9,356	9,623	6,646
Processed poultry	135,943	121,564	126,382	143,602	137,263
<b>Total</b>	<b>360,768</b>	<b>359,689</b>	<b>396,602</b>	<b>459,950</b>	<b>416,803</b>

Source: GTIS, HM Revenue and Customs

**Table 5.4 UK fresh/frozen poultry meat imports by source**

<b>Tonnes, product weight</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
<b>Total</b>	<b>334,017</b>	<b>338,278</b>	<b>378,926</b>	<b>412,368</b>	<b>380,256</b>
of which from:					
Netherlands	151,062	158,596	144,066	169,462	180,145
Poland	25,490	27,257	39,531	43,497	46,439
Ireland	25,800	26,663	63,956	66,799	28,619
Belgium	20,343	21,171	23,703	20,644	28,005
Germany	29,163	22,508	25,304	31,272	25,969
France	28,948	25,050	20,125	20,276	14,740
Italy	9,615	9,396	9,182	9,709	14,604
Chile	7,666	9,599	9,887	9,877	8,792
Brazil	11,738	9,043	10,183	9,282	6,584

Source: GTIS, HM Revenue and Customs



Table 5.5 UK fresh/frozen poultry meat exports by destination

Tonnes, product weight	2008	2009	2010	2011	2012
Total	278,284	258,008	270,450	295,241	288,934
of which to:					
Netherlands	118,827	76,237	59,588	52,799	65,938
Ireland	28,977	31,820	44,165	46,048	48,730
South Africa	0	1,639	7,810	24,722	26,602
Hong Kong	5,279	14,222	26,236	40,215	25,449
France	23,939	21,309	21,824	23,986	18,458
Spain	9,329	10,852	14,123	15,555	17,020
Germany	32,683	46,429	34,669	26,212	15,873
Hungary	9,115	8,181	7,859	7,886	9,972
Ukraine	3,342	1,742	5,970	8,547	9,637

Source: GTIS, HM Revenue and Customs

Table 5.6 UK processed poultry meat imports by source

Tonnes, product weight	2008	2009	2010	2011	2012
Total	248,184	240,424	254,079	278,732	292,525
of which from:					
Thailand	115,934	123,940	134,894	138,900	134,479
Netherlands	40,369	29,647	19,279	28,164	33,461
Ireland	39,156	27,435	23,668	27,674	28,450
Brazil	21,988	17,871	20,414	19,939	21,456
Germany	9,166	10,503	14,084	13,092	15,607
Poland	3,813	5,223	6,897	10,490	11,952
France	4,513	4,369	4,164	4,817	9,005
Denmark	705	2,261	3,667	9,266	8,359

Source: GTIS, HM Revenue and Customs

Table 5.7 UK processed poultry meat exports by destination

Tonnes, product weight	2008	2009	2010	2011	2012
Total	45,529	38,254	38,341	45,511	45,791
of which to:					
Ireland	27,689	24,596	24,011	27,602	25,585
Netherlands	5,403	4,315	3,987	5,912	6,543
Germany	1,762	2,237	4,088	4,981	5,959

Source: GTIS, HM Revenue and Customs

## Chapter 6 – Consumption

Table 6.1 UK per capita consumption of poultry meat

	Poultry meat kg/person/year	All meat
2000	30.0	78.8
2001	30.1	78.0
2002	30.2	80.2
2003	30.0	80.5
2004	31.2	82.4
2005	31.5	83.1
2006	30.7	82.8
2007	29.1	82.3
2008	28.5	79.4
2009	28.9	77.3
2010	30.7	78.7
2011	31.3	79.0
2012	31.5	79.3

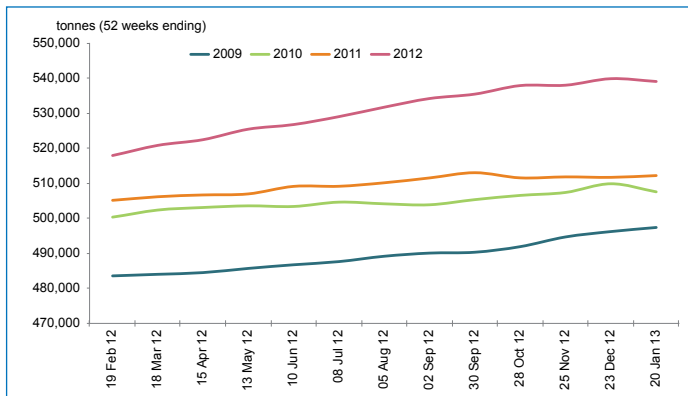
Source: AHDB MI calculations based on data from Defra, HMRC, ONS

Table 6.2 GB retail chicken and egg value sales by type of outlet

%	Multiples	Freezer centres	Butchers	Other
<b>Chicken</b>				
2010	90.1	4.3	3.5	2.2
2011	89.3	4.9	3.3	2.5
2012	89.2	4.9	3.2	2.7
<b>Eggs</b>				
2010	84.4	4.8	1.8	9.0
2011	85.4	4.7	1.8	8.1
2012	86.1	5.0	1.6	7.3

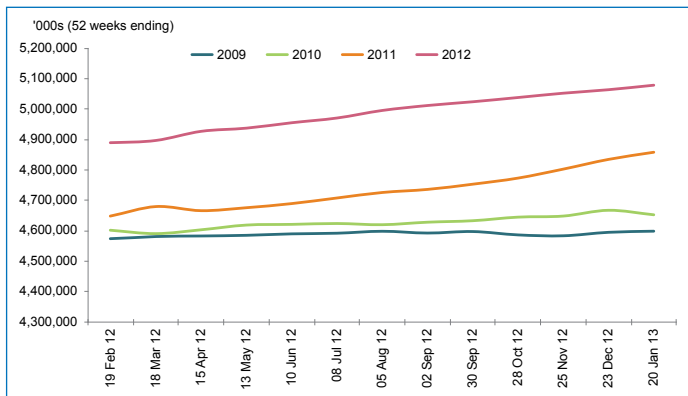
Source: Kantar WorldPanel

Figure 6.1 Trends in GB household chicken purchases by volume



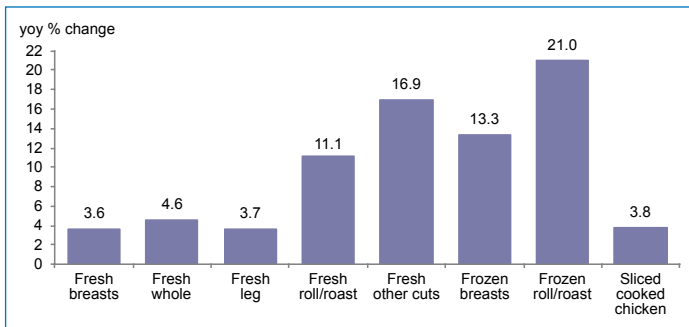
Source: Kantar WorldPanel

Figure 6.2 Trends in GB household egg purchases by volume



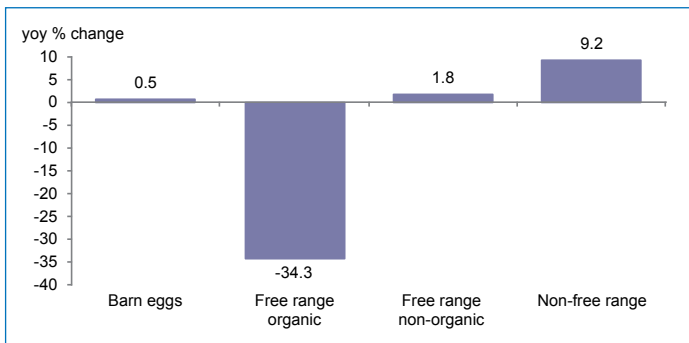
Source: Kantar WorldPanel

### Figure 6.3 Change in GB retail volume sales of chicken by product, 2012



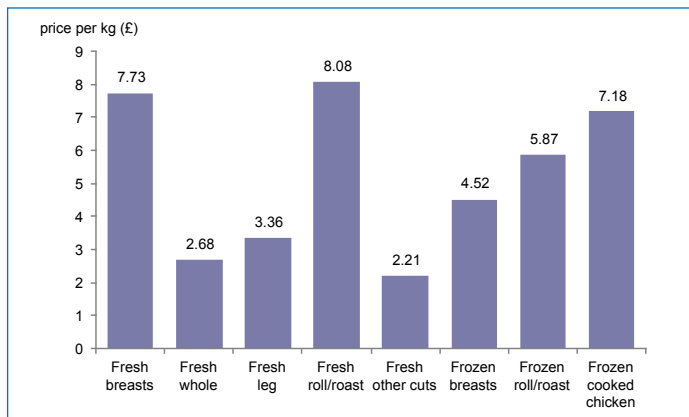
Source: Kantar WorldPanel

### Figure 6.4 Change in GB retail volume sales of eggs, 2012



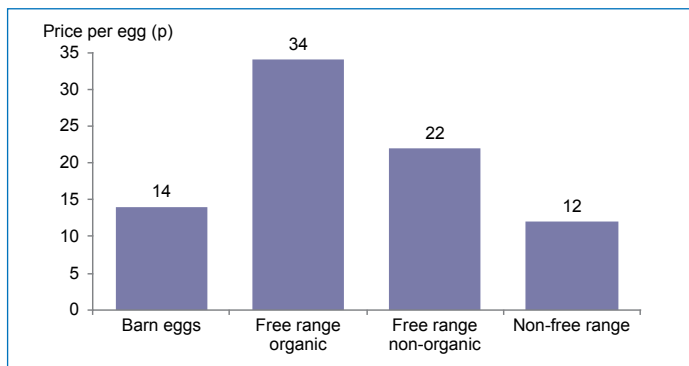
Source: Kantar WorldPanel

Figure 6.5 Average GB retail price of chicken cuts, 2012



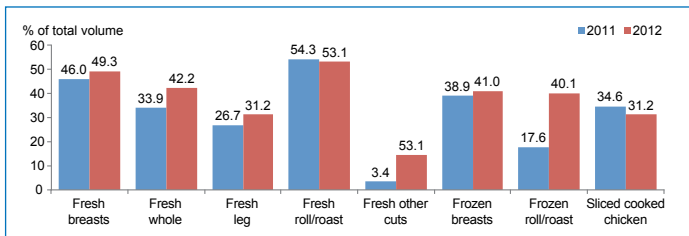
Source: Kantar WorldPanel

Figure 6.6 Average GB retail price of eggs, 2012



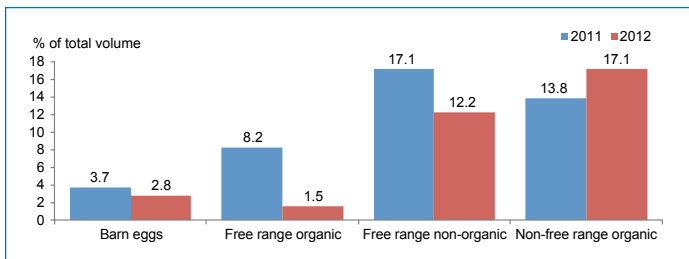
Source: Kantar WorldPanel

### Figure 6.7 Proportion of chicken products on promotion in GB retail outlets



Source: Kantar WorldPanel

### Figure 6.8 Proportion of eggs on promotion in GB retail outlets



Source: Kantar WorldPanel