

The Poultry Sector Research Briefing

October 2018



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The Poultry Sector

Research Briefing

October 2018

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Paper Overview:

This Research Briefing provides an overview of the poultry sector in Wales. It sets out the latest poultry meat and farm gate egg prices and describes recent developments in global trade, supply and producer numbers. It also outlines processing and contractual arrangements, and how the sector is regulated. Finally, this briefing discusses the potential impact of Brexit.

The Research Service acknowledges the parliamentary fellowship provided to Jessica Laimann by the Arts and Humanities Research Council, which enabled this Research Briefing to be completed.



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Introduction

This Research Briefing gives an overview of the current state of the UK poultry meat and egg sector, with particular reference to Wales. The poultry meat and egg industry is a comparatively small agricultural sector in the UK. In 2017, poultry meat and eggs accounted for **11.5% of agricultural production in the UK** by value, and for **6.1% in Wales**. Poultry meat and eggs hold roughly equal shares of total Welsh agricultural production value, with 2.8% for poultry meat and 3.3% for eggs in 2017. This is significantly different from the UK as a whole, where the value of poultry meat is almost four times the value of eggs.

Between 2016 and 2017, the value of poultry meat in Wales **dropped by 4.3%** from £47 million to £45 million. In the same period, the value of eggs **rose by almost 27%** from £41 million to £52 million. The UK poultry market has been subject to ongoing volatility, which is partly due to trade restrictions associated with repeated Avian Influenza (AI) outbreaks. However, as of February 2018, consumption of poultry meat is high (**42% of total UK meat consumption**) and further expansion of the sector is expected.

Prices

Poultry meat prices

Since most poultry meat in the UK is produced in vertically integrated systems, only wholesale-to-retailer prices are available. Defra discontinued **the data set after April 2016**, but has provided the Research Service with prices up to April 2017.

Chicken breast fillets and turkey generally achieve higher prices than broilers (table chickens) and roasters (birds that are older and heavier than broilers) (see Figure 1). Prices for broilers, roasters, and turkeys have been relatively constant between 2014 and 2017, with broilers achieving prices in the region of 150 pence per kilo (ppk), roasters around 130 ppk and turkey around 330 ppk. Prices for chicken breast fillets diverged from this trend. Between January 2016 and January 2017, they increased by 36%, followed by a slight fall until May 2017.

Recent prices can be accessed by subscribers of **Poultry World** magazine.

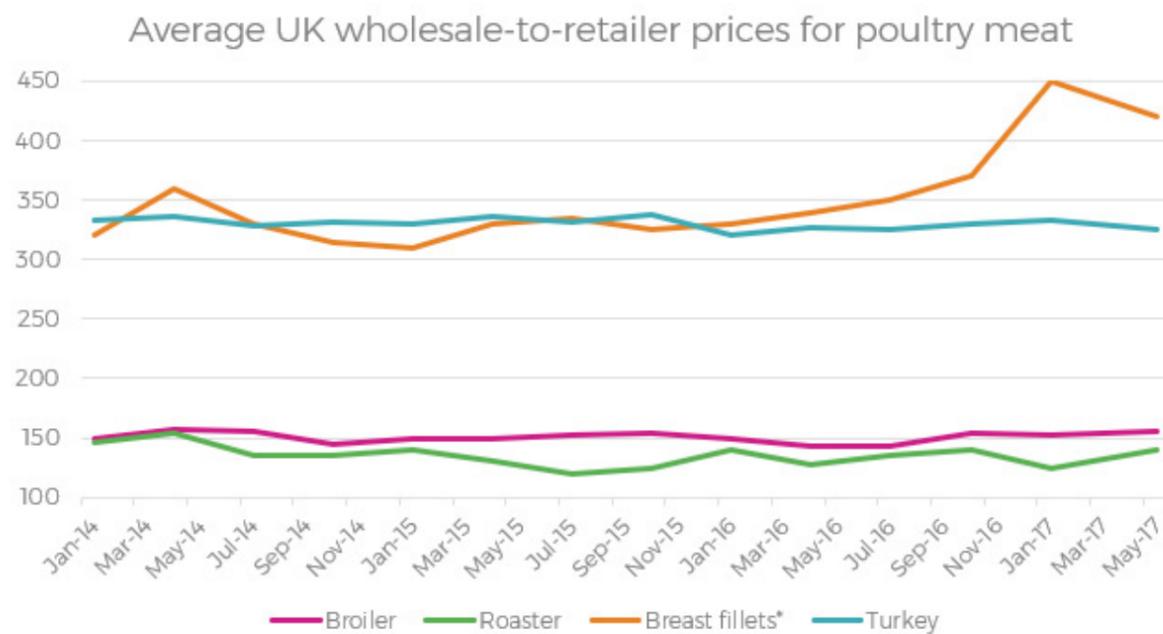


Figure 1: Average UK wholesale retail prices in pence per kilo for home-produced poultry. Source: **Defra**.

*Does not include prices for uncalibrated breast fillets.. Calibrated chicken is produced and supplied within a specified weight range meaning the chicken is supplied as a regular size

UK farmgate egg prices

Farmgate prices represent the average price egg packers paid to egg producers. Free range eggs are generally higher priced than enriched cage eggs (**enriched cages replaced battery cages in 2012, following an EU ban**). In the first quarter of 2018, **farmgate prices** were 54.1 pence per dozen (ppd) for enriched cage eggs and 82.7 ppd for free-range eggs. The **average farmgate price for all egg types** was 71.3 ppd. This is a 0.6% increase from the same quarter of 2017.

Farmgate prices for barn eggs and organic eggs have not been available since 2012. **The latest available data** from 2011 shows barn eggs at 72 ppd and organic eggs at 138.3 ppd.

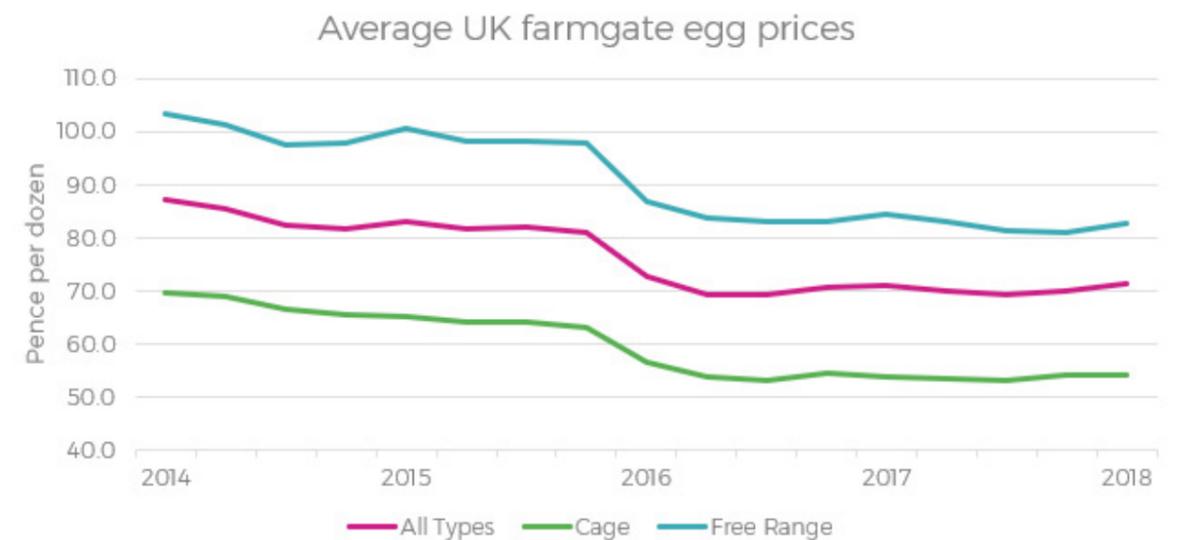


Figure 2: Average UK farmgate prices in pence per dozen (ppd) for all, enriched cage and free-range eggs. Source: **Defra**.

Global trade

Poultry meat

Global trade has been **repeatedly affected by Avian Influenza (AI)** in past years. Outbreaks occurred in 2015 and again in the first half of 2017, just as the industry started recovering. In the second quarter of 2017, the challenges of AI combined with **the Brazilian meat scandal** created a 'perfect storm', leading to **a 5% reduction in global trade** compared to the previous year. Due to AI-related trade restrictions, the EU lost market shares to Thailand and the US.

Recovering demand together with tight supply in the aftermath of the 'perfect storm' created favourable conditions **at the beginning of 2018**. However, in the second quarter of 2018, prospects were clouded by a **pending trade shake-up**. Rabobank predicts **turbulence for the global poultry meat industry** caused by ongoing AI trade restrictions, investigations into the Brazilian meat scandal, and the upcoming ban on stunning for exports into Saudi Arabia. This could involve rising prices for local producers in the EU.

Data on global poultry meat trade is available for chicken and turkey, but not for smaller market segments like duck or goose.

Frozen chicken exports, which made up US\$16.1 billion of global chicken meat exports in 2017, consist mostly of meat from Brazil, the United States and the Netherlands. **Fresh and chilled chicken**, which made up US\$5.9 billion, is exported mainly by EU countries (the Netherlands, Poland and Belgium).

In 2016, the **total value of global turkey exports** was US\$2.5 billion. Total turkey exports consist of fresh or chilled meat (55.5%) and frozen meat (44.5%). As of July 2018, data on Turkey exports in 2017 has not been made available.

In 2016, the **major importing countries** of poultry meat products by value were Germany, the Netherlands, and the UK, followed by Asian markets like Hong Kong and Saudi Arabia.

UK exports

In 2017, the UK exported **over 396,100 tonnes of poultry meat (PDF 1.28MB)**, which was 21.9% of the total UK production. Around 80% of this was exported to EU countries. In total, UK exports had a value of around £396.2 million. Exports **consist mainly of dark meat** (such as legs and thighs) and offal, which are less popular with UK consumers than breast meat. UK exports increased 17.1% in volume and 13.2% in value compared to the previous year.

UK imports

The UK imported over **867,400 tonnes of poultry meat in 2017 (PDF 1.28MB)**. This is equivalent to almost £2.253 billion in value and accounts for 38.1% of total UK poultry meat consumption. Around three quarters of UK poultry meat imports come from EU countries, which supply about half of all processed meat imports and almost all fresh and frozen poultry meat imports into the UK.

The main UK supplier of poultry meat is the Netherlands, which accounted for **more than a quarter (PDF 1.28MB)** of UK poultry imports in 2017. While the Netherlands mainly supplies fresh and frozen poultry meat to the UK, Thailand is the UK's biggest supplier of processed poultry meat. In 2017, Thai processed poultry meat comprised almost 16% of UK poultry meat imports.

Eggs

The UK's international trade in eggs is comparatively limited. In 2017, the UK exported **about 149.8 million eggs (PDF 1.28MB)**, which is 1.25% of the **estimated total UK production** for the same year. 71% of exports were shell eggs (eggs sold in their shells in natural state) and 29% other egg products (processed products or liquid egg). Over the same period, the UK imported **1.98 billion eggs (PDF 1.28MB)**, which is 15.3% of **total consumption**. UK egg imports mostly consist of other egg products (around 70%). Shell eggs consumed in the UK are mainly home-produced.

UK supply

Poultry meat

Total UK poultry meat production in April 2018 was 182,800 tonnes, a 3.7% increase compared to the same month in 2017. Broilers made up almost 90% of total poultry meat production, followed by turkey (5%), boiling fowl (older chickens for stewing, 3%) and duck (1%). There are annual highs of turkey slaughtering volumes around the Christmas period, complemented by annual lows in broiler slaughters at the same time.

Annual slaughtering numbers suggest that UK production of broilers has steadily increased since the first available recordings in 1994. This trend has continued in recent years (see Table 1). Boiling fowl production largely follows this development, but has been more volatile in recent years. Turkey production has suffered a steady decline since 1999, albeit with a slight increase in 2015.

	Broilers	Boiling fowl	Turkey
2013	888.8	44.1	17.4
2014	904.6	42.7	18.5
2015	915.1	49.1	16.0
2016	962.8	49.5	16.5
2017	1,015.6	57.4	15.2

Table 1: Number annual UK poultry slaughters in million birds. Source: Defra

In 2017, Wales accounted **for 2% of total UK poultry meat production** by value. Although poultry meat production by value peaked in 2013 in both **Wales (at £71 million)** and the **UK (at £2.465 billion)**, there have been marked differences in recent developments. While UK output levels, after suffering a small decline, had almost returned to their 2013 peak values by 2017, poultry meat outputs in Wales incurred a 37% drop over the same period (see Figure 3).

Poultry output in Wales and the UK (indexed at 100% in 2010)



Figure 3: Poultry meat production by value in Wales and in the UK. Values in 2010 are indexed to 100%. Source: Welsh Government and Defra

Eggs

Defra measures UK egg production in terms of number of eggs packed in UK packing stations, which accounts for nearly 90% of total UK egg production. In 2017, total UK packing station throughput **was around 10.8 billion eggs** (59,951 cases, each containing 360 eggs). This suggests that total UK egg production was around 12 billion eggs. Total UK egg production amounted to **£624 million in value**, with production in Wales **accounting for 8% (£52 million)**. Between 2014 and 2017, total packing station throughput increased year by year by around 3%. For the first quarter of 2018, production **was up by 3.8%** compared to the same quarter in the previous year.

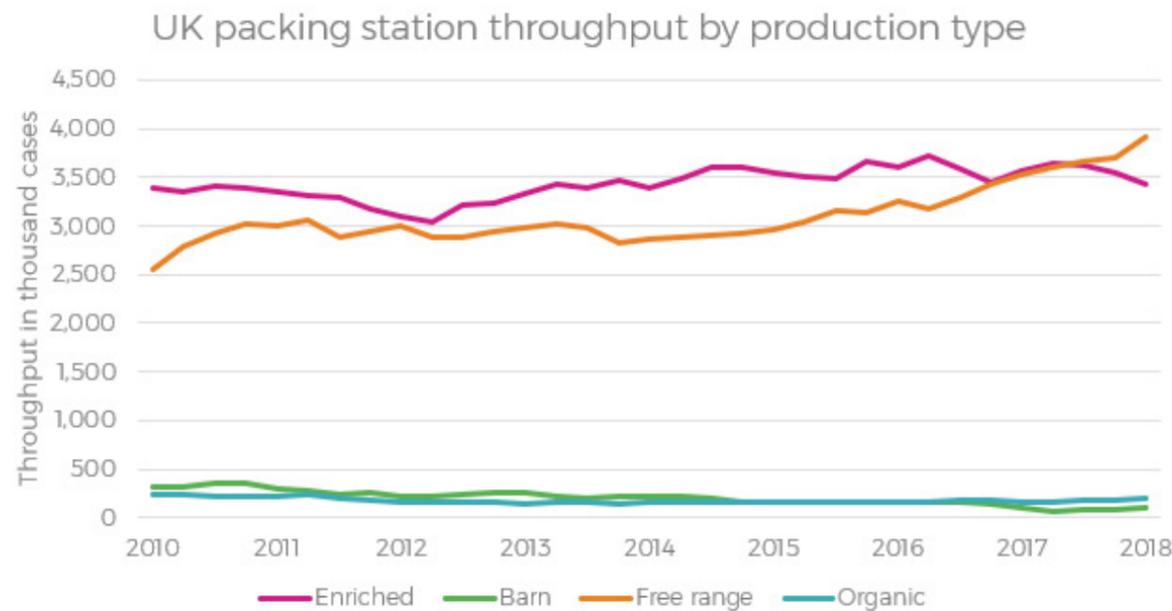


Figure 4: UK packing station throughput in thousand cases (360 eggs per case). Source: Defra.

In the first quarter of 2018, **the majority of eggs produced in the UK** were free range eggs (51%) and enriched cage eggs (45%). Organic eggs and barn eggs represent only small fractions, at 2.5% and 1.4% respectively. While enriched cage production has increased only marginally (1.2%) between 2015 and 2017, production of free range eggs received a boost of 18%. Representatives of the **British Free Range Egg Producers Association** (BFREPA) have expressed concerns that this development may lead to **oversupply and declining prices**.

According to the **British Egg Industry Council**, over 90% of UK eggs are produced under the **British Lion food safety scheme**.

Supply chain margins

No detailed information on supply chain margins has been published, but sources suggest that margins are small. According to **Food and Drink Wales**, 'production efficiency is key as margins are tight' with feed costs, transport costs and finished bird prices as the main variables. A Welsh Government Brexit working group reports that poultry farms are relatively large because **margin per unit output is small** and production requires considerable capital investment in facilities.

In recent years, the poultry sector has been subject to high volatility in feed prices. Between 2013 and 2016, average compound feed **prices have been falling** by 30% from their peak values of £311 per tonne in the second quarter of 2013 to £219 per tonne in early 2016. After a period of comparatively high profitability, media reports in July 2016 **predicted falling margins** as a result of the beginning of a 'period of higher feed costs.' By the first quarter of 2018, feed prices **had risen to £249 per tonne**.

Welsh producers

In June 2017, the **total poultry stock in Wales** was over 7.7 million birds, which was 4.2% of the total UK poultry stock. Over 97% of poultry in Wales were chickens, followed by 1% turkey and small numbers of other birds such as duck, geese, guinea fowl and ostriches. In Wales, **over half of the total chicken stock** was used for meat production, 27% for egg production, and the remainder for breeding.

Overall poultry numbers in Wales **marginally decreased** (1.3%) from 2015 to 2017. However, there has been a notable shift in composition. While the broiler stock shrank by 11.7% between 2015 and 2017, the number of chickens used for egg production increased by over a quarter during the same period. This development involved a noticeable expansion of free-range egg production in mid and west Wales (see Section 8). Poultry numbers in Wales are difficult to measure because poultry sheds are emptied for cleansing every 2-3 months. If a particular shed is emptied for cleansing on survey day, this can have a significant impact on the poultry number estimates.

This difficulty is amplified by the structure of the Welsh poultry industry, which is characterised by a comparatively small number of large producers. In 2016, **fewer than a hundred producers** accounted for over 90% of poultry in Wales. The Welsh Government informed the Research Service that there were 134 specialist poultry farms in Wales in June 2017. The vast majority of these farms housed more than 10,000 birds each. In total, specialist poultry farms accounted for 87% of the Welsh poultry stock in 2017. The rest of the poultry stock was distributed over more than 6,000 micro farms (less than eight **European size units**) and farms that do not specialise on poultry. These farms typically have fewer than a hundred birds.

Large poultry producers typically run **vertically integrated companies** that combine production and processing. Poultry production in Wales tends to cluster around major processing plants, with key areas along the border with England and in parts of Pembrokeshire and Anglesey.

Data on the average farm income from poultry farming is unavailable for Wales because specialist poultry farms (farms with over 1,000 birds) are not surveyed in the **Farm Business Survey**. In England, **Defra statistics** recorded an average poultry farm income of £54,800 in 2016-17. The statistics also suggests that average farm incomes have increased between 2015-16 and 2016-17 for all farm types except poultry, where a decrease of 49% has been measured. The key driver for lower incomes from poultry meat was **reduced throughput of birds** compared to the previous year. However, the significant income decrease may partly be an effect of small sample size and should therefore be treated with caution.

Processing and products

Poultry meat

The UK poultry meat sector is dominated by very large companies that operate vertically integrated systems. In 2016, **eleven poultry-only processors** and **36 poultry cutting plants** were registered in Wales. Three of the eleven processing plants were major UK poultry meat processors that are members of the **British Poultry Council (BPC)**. An additional plant **opened in November 2017 in Wrexham**. The £20 million project received £3.15 million support from the **Welsh Government's Food Business Investment Scheme**.

Employment **rose by 40%** between 2010 and 2016 within poultry plants in Wales. This was significantly higher than the average for Great Britain (5%) and indicates the increasing prominence of Wales in the Great Britain industry.

No information has been published regarding how much poultry meat produced in Wales is also processed in Wales, and vice versa.

Eggs

In the first quarter of 2018, UK egg processors **bought 345 million eggs (21,000 tonnes)**, a 13% decrease on the same quarter last year. Total production was **22,400 tonnes**, down by 3% compared to the same period in 2017 (see Figure 5). Liquid egg made up just over two thirds of total production and the remaining third comprised hard boiled eggs and other egg products. Note that total production includes any processing carried out for external customers who provide their own eggs and can therefore be higher than total purchase volume.

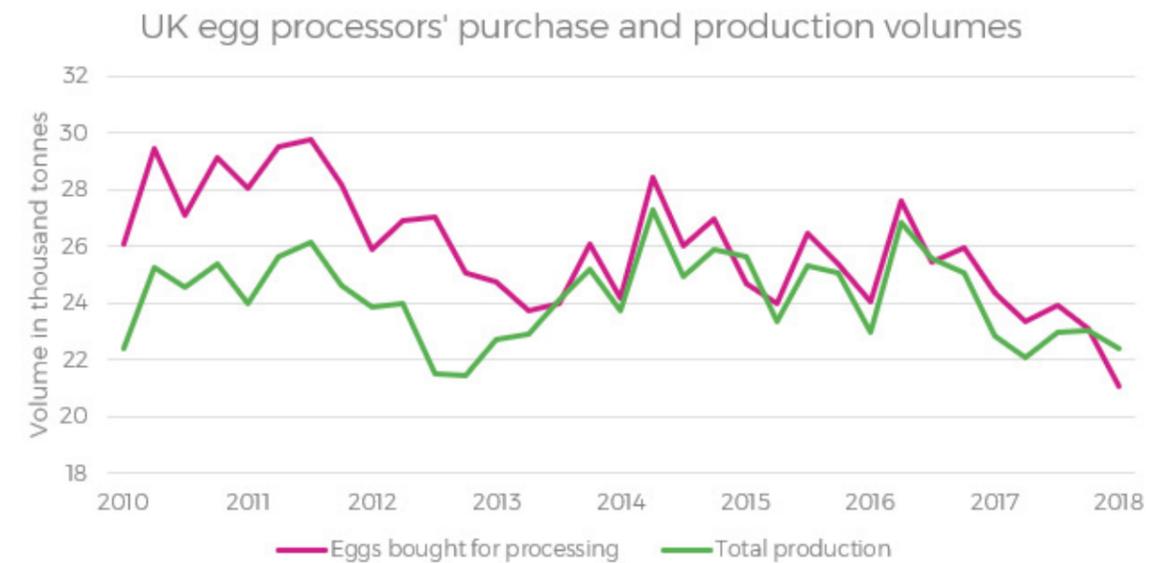


Figure 5: UK egg processors' purchase and production values in thousand tonnes. Source: **Defra**.

The British Egg Industry Council informed the Research Service that it is not aware of any egg processing plants in Wales but reports considerable investment into building new and updating existing plants over the last few years in the UK.

Contractual arrangements in the supply chain

Contract availability

The Welsh Government's **Brexit working group has said that** 'Poultry units have aligned supply contracts with processors and retailers. Supply to market and costs are closely controlled and the margin per unit output is small. Farms are therefore relatively large and there is considerable capital investment in infrastructure.'

According to the **Food and Drink Wales**, two contract types are available to Welsh producers:

- In major vertically integrated companies, chicks and feed are sourced for the farmer who is paid to cover costs of heating, shavings, labour and depreciation etc; and
- In the independent sector, farmers are paid a market rate for their product.

While contracts in vertically integrated companies can provide a good returns for top producers and average returns for average producers, whose costs are higher, contracts in the independent sector can provide little or no return for average producers.

Codes of practice

In the UK, contractual relationships between the ten biggest grocery retailers and their direct suppliers are regulated by the **Groceries Supply Code of Practice**. Large poultry meat producers who operate vertically integrated systems that directly supply retailers are covered by this code. However, since the code does not apply to contracts between producers and processors, it does not cover independent poultry meat producers who sell their output to processors. In October 2016, the UK Government carried out a consultation on **extending the Groceries Code Adjudicator's (GCA) remit** in the UK groceries supply chain. However, when the consultation concluded in January 2017, support for extending the GCA's remit was found to be limited.

In the **beef and dairy sector (PDF 1.3MB)**, where producers rarely supply major retailers directly, voluntary codes of practice have been introduced between producers and processors to improve contract terms for producers. As of June 2018, there is no such code in place for poultry meat or egg producers.

Environmental issues and regulation

The free-range poultry sector has expanded in recent years, especially in mid and west Wales. This is reflected in a rise in the number of planning applications for poultry sheds. According to the Brecon and Radnor Branch of the **Campaign for the Protection of Rural Wales (CPRW)**, between July 2015 and June 2018 **116 such applications were submitted in Powys**. Almost three quarters of applications were for free-range egg production and all applications together would amount to capacity for over 3.5 million additional birds. As of June 2018, three quarters of applications had been approved, 24 were undecided, two refused and two withdrawn. The expansion has been attributed to poultry being an **attractive diversification opportunity** that may improve farm resilience in the light of the potential challenges presented by Brexit.

However, as the sector has grown, so **have concerns about the potential environment impact**, in particular on water and air quality.

In March 2018 **Afonydd Cymru**, the umbrella body for the six rivers trusts in Wales, submitted a **complaint to the European Commission concerning agricultural pollution (PDF 361KB)** in Welsh rivers resulting in an alleged breach of the **EU Water Framework Directive**. The complaint asserts that the Welsh Government has failed to adequately regulate agricultural activity, including the poultry sector. The European Commission is currently considering the complaint.

In May 2018, a petition asking for the Welsh Government to **improve controls of the expanding intensive poultry industry** was submitted to the Assembly. The petition was submitted by the Brecon and Radnor Branch of CPRW and had received over 4,560 signatures. The main concerns expressed in the petition include a perceived under-resourcing of **Natural Resources Wales (NRW)** and a failure of Local Planning Authorities (LPAs) to consider cumulative effects of neighbouring intensive poultry units. As of September 2018, the petition is being considered by the Assembly's **Petitions Committee**.

NFU Cymru has told the Research Service that the poultry sector would emphasise the economic benefits to rural communities of diversification into poultry units and that the contracted nature of the sector means that farmers are very conscious of their responsibility to adhere to environmental regulation. The sector would also argue that there are benefits to the clustering of units, such as ease of sharing good practice and reduced travelling between units to collect birds and eggs.

Regulation

There are two main aspects to the regulation of poultry units - the planning system, which is the responsibility of LPAs, and the environmental permitting system, which is the responsibility of NRW. Broadly speaking, new units require planning permission and above certain thresholds also require an **Environmental Impact Assessment (EIA)**. An **environmental permit** is also required above a certain threshold. Poultry units are also subject to regulation relating to animal and human health disease risk, and animal welfare.

Planning

Planning applications for poultry units must be determined in accordance with the **Local Development Plan** unless material considerations indicate otherwise.

LPAs must take into account the views of statutory consultees (e.g. NRW) and other bodies (e.g. Public Health Wales and local wildlife trusts) as well as anyone else who has a view, including members of the public. LPAs need to satisfy themselves that they have sufficient information and expert advice available to properly determine applications.

With regards to EIA, Part 2 of the **Town and Country Planning (Environmental Impact Assessment) (Wales) Regulations 2017** details development proposals and associated thresholds defining where a development proposal constitutes EIA development. These are contained in Schedule 1 and 2 of the Regulations. Schedule 1 lists those developments where EIA is mandatory and Schedule 2 where the development must be screened to determine if it is EIA development.

Schedule 1 states that the threshold for the 'intensive rearing of poultry is 85,000 places for broilers or 60,000 for hens'.

While an EIA is not a mandatory requirement for a proposed development, the floor area of many of the proposed poultry units exceeds the applicable threshold of 500 square metres. For the purposes of the Regulations, these units are therefore Schedule 2 development which require that the local planning authority issues a screening opinion. In this case, the LPA then considers the development against the criteria set out in the Regulations and decides whether the development constitutes EIA development or not. More on EIA can be seen in the Research Service's **EIA Research Briefing (PDF 1.90MB)**.

Environmental Permitting

Intensive poultry units with 40,000 or more poultry places are regulated under **NRW's environmental permitting regime (PDF 542KB)** in accordance with the requirements of the **EU Industrial Emissions Directive**.

The core elements of the environmental permitting regime are the application of **Best Available Techniques (BAT)** conclusions for pollution control and the requirement to prevent any significant pollution. NRW applies these and other requirements through environmental permits, which impose conditions on how the units can be operated.

Under the EU Directive, NRW has to set emission limits which ensure that emissions **do not exceed the levels associated with BAT under normal conditions**. BAT involve the technology and the operational techniques which are required to prevent or reduce polluting emissions to air, land and water, as well as overall environmental impact – including noise and odour.

As part of the permitting process, NRW examines potential emissions against established environmental quality. NRW will only issue a permit if it is convinced that communities and the environment, including any sensitive habitats, will be protected and that no significant pollution will be caused.

In 2017, NRW issued **updated guidance for preventing polluting emissions from intensive poultry units (PDF 658KB)**, which LPAs can use in their own environmental permitting process. It sets out tighter thresholds for ammonia and nitrogen emissions that operators need to consider in their assessment. The guidance was initially published in October 2017 and will be reviewed in December 2018.

Recent developments

In response to a written question, the Cabinet Secretary for Energy, Planning and Rural Affairs, Lesley Griffiths, announced on 11 June 2018 that she had **ordered that guidance be issued to LPAs**. The 'Dear Chief Planning Officer Letter' was **published the following day** and advises LPAs 'to exercise particular care when considering developments which would bring livestock units within close proximity to sensitive land uses such as homes, schools, hospitals, office development or sensitive environmental areas'. It also emphasises the need to take into account cumulative effects and invites LPAs to participate in future Welsh Government work on nitrate pollution and odorous emissions.

In response to the question, the Cabinet Secretary also stated that she was exploring options for stricter controls on polluting emissions from intensive farming. The Welsh Government has informed the Research Service that this includes polluting emissions from intensive poultry units, in particular those below the current threshold for environmental permitting.

The Welsh Government consulted on a [revised version of Planning Policy Wales \(PPW\)](#) between February and May 2018. Paragraphs 5.136 to 5.138 of the [consultation draft \(4.07MB\)](#) address the location of polluting development. The final version of the revised PPW is expected to be published before the end of 2018.

The poultry industry post-Brexit

Together with the dairy industry, the poultry industry is considered **one of the agricultural sectors most resilient** to different Brexit scenarios. This is due to its focus on the internal market rather than exports, as well as its relative independence of EU subsidies. Still, the precise impact of Brexit on the poultry sector depends on a number of factors, such as what tariffs will apply to EU-UK trade, what export markets can be accessed post-Brexit, whether EU imports will have to be replaced with domestic or non-EU country supply, and to what extent existing environmental, animal health, and food safety regulations might change.

Poultry meat and **egg** trade are subject to a number of EU policy measures and regulations, including **animal welfare regulations**. In 2016, the EU applied **tariffs between €187 and €1,283 per tonne to non-EU poultry meat (PDF 3.23MB)** (€1,024-€2,765 per tonne for processed poultry), with most imports falling under Tariff Rate Quotas (TRQs).

Poultry meat trade flows **between the UK and the EU (PDF 1.27)** are significant. In 2017, UK exports to the EU accounted for around 17.5% of total UK production, and EU imports to the UK accounted for around 30% of total UK consumption. Third-country poultry imports to the UK can be expected to increase significantly in a free trade scenario due to the elimination of import tariffs. Trade with the US would require an **agreement on sanitary measures** such as chlorine washing, which may be **difficult to achieve**.

By contrast, UK egg exports are minimal and imports comprise only around 15% of total consumption. The **main post-Brexit issue** for the UK egg market would be trade with non-EU countries which have lower animal welfare and health principles.

The UK was 75% self-sufficient in poultry meat in 2017, and **84% self-sufficient in eggs in 2016 (PDF 1.28MB)**. As of June 2018, more recent data for eggs is unavailable and the 2016 data provisional.

Although World Trade Organization (WTO) tariffs for poultry meat are **lower than those for dairy and beef**, a no deal scenario with consequent WTO tariffs on EU-UK trade could significantly affect the UK market. Poultry meat prices in the UK are likely to increase. This could be an opportunity to expand UK production. According to the BPC, the poultry meat industry is the only livestock sector that could **quickly expand production** to increase UK self-sufficiency. However, this

would require **high capital investments into housing, important planning decisions**, and an export expansion that offsets the low return on dark meat and offal. According to the **Institute for Global Food Security**, around **three quarters (£300 million) of UK poultry meat exports** in 2017 were dark meat. In order to balance demand for white and dark meat, the UK would have to increase exports to countries that value dark meat, such as China.

Other factors that may prevent local poultry producers from **picking up the supply slack** are the combined effects of increasing costs of production and shortage of labour. According to the BPC, **costs of production are likely to increase** in areas such as feed prices, utility prices and costs of employment. Competition for labour will be a key issue for the industry. **60% of the sector's employees** are EU nationals from outside the UK. BPC Chief Executive Richard Griffiths described post-Brexit access to migrant labour as **'incredibly important'** and called for a simple work-visa system.

Poultry meat and egg production receive **no direct EU subsidies** and will therefore be less affected by the loss of Common Agricultural Policy (CAP) payments than other agricultural sectors. Details on the likely effects of different Brexit scenarios on poultry farmers' income are provided in **a study commissioned by the NFU (PDF 932KB)**.

For further information on Brexit and the poultry industry, see the **2016 AHDB Horizon Report (PDF 3.23)** and the Welsh Government's **EU Exit Scenario Summary Report**.

Key sources

- UK Government, **Latest poultry and poultry meat statistics**
- UK Government, **Latest UK egg statistics**
- Welsh Government, **Survey of agriculture and horticulture**
- Welsh Government, **Food and Drink Wales poultry sub sector report (PDF 611KB)**
- Welsh Government, **EU exit scenario summary report**
- **AHDB poultry pocketbook 2018 (PDF 1.28MB)**
- **AHDB horizon report (PDF 3.23)**
- **NFU, Implications of a UK exit from the EU for British agriculture (PDF 932KB)**

