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THE ECONOMIC IMPACT OF THE POULTRY MEAT INDUSTRY

AUGUST 2025

Oxford Economics

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EXECUTIVE SUMMARY

The British poultry meat industry makes a significant contribution to the UK economy, supporting thousands of jobs and generating millions of pounds in tax revenues every year. This report, produced by Oxford Economics, quantifies its total economic impact on the UK in 2023.

The industry comprises:

- **poultry farmers**, who raise chickens, turkeys, ducks, and geese; and
- **poultry processors**, who slaughter, clean, prepare, and manufacture poultry meat food products.

THE INDUSTRY'S GDP IMPACT

We calculate that **the British poultry meat industry supported a total gross value added contribution to UK GDP of £8.5 billion in 2023.**

Of this contribution, the industry itself generated **£2.8 billion** (34% of the total). The remainder was generated by:

- the industry's spending on goods and services from its UK supply chain (which contributed **£3.2 billion** to UK GDP in 2023); and
- wage payments to those working directly in the British poultry meat industry and for companies in its UK supply chain, which were then spent in the consumer economy (leading to a GDP contribution of **£2.4 billion**).

As a result, in 2023, the industry's "GDP multiplier" was 3.0. This means that for every £1 million of UK GDP accounted for by the poultry meat industry itself, a further £2.0 million was generated elsewhere in the economy as a result of the industry's expenditure.

JOBS IMPACT

We calculate that the British poultry meat industry supported a total of 113,500 jobs across the UK in 2023. Of these, 35,700 workers (33%) were employed directly by the poultry meat industry—with some 27,100 involved in poultry meat processing, and 8,600 engaged in poultry farming.

The poultry meat industry's "employment multiplier" in 2023 was slightly high at 3.2. In other words, for every 100 jobs within the industry itself, a further 220 were created elsewhere in the economy because of the associated supply chain and wage-related impacts.

TAX IMPACT

Finally, combining all the economic activity it stimulates, we find that **the British poultry meat industry supported a £1.9 billion tax contribution to the UK Exchequer in 2023.** This is equivalent to a third of all the public sector expenditure on services to agriculture, fisheries, and forestry in the 2022/23 financial year.

£8.5 billion

contribution to UK GDP supported by the poultry meat industry in 2023.



113,500 jobs

Supported by the poultry meat industry in 2023.



1. INTRODUCTION

This study, commissioned by the British Poultry Council, assesses the total contribution made by the poultry meat industry to the UK economy in 2023. The poultry meat industry comprises both the farming and processing of poultry.¹

To quantify its total annual impact, we use an analytical method called an economic impact (EI) assessment. This examines the impacts of three separate types of expenditure, each of which stimulates significant activity throughout the UK economy:

- The **direct impact**—economic activity stemming from the operational expenditure at the hatcheries, farms, and meat processing plants in the poultry meat industry itself.
- The **indirect impact**—economic activity stimulated in the supply chain of the poultry meat industry. This impact is felt because of the industry's purchases of goods and services.
- The **induced impact**, or wage expenditure impact—this arises as employees working in the poultry meat industry, and throughout its supply chain, spend their wages; for example, in local retail and leisure establishments.

The total economic impact of the British poultry meat industry in 2023 is the sum of its direct, indirect, and induced impacts for that year. (See Fig. 1, overleaf, for a visual description of how the total economic impact is calculated using these three channels of impact.)

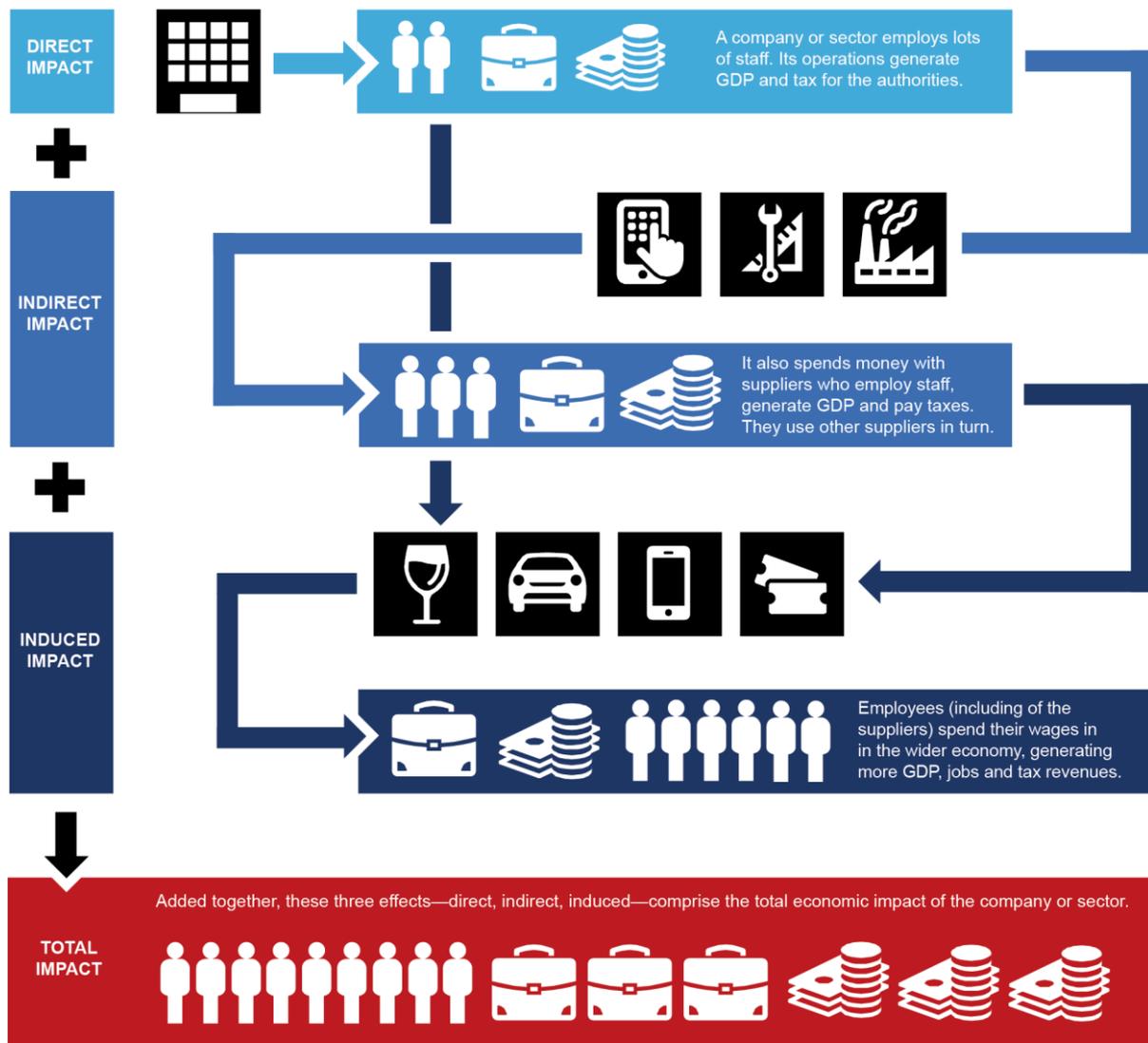
We use three metrics to quantify each channel of economic impact:

- **Gross value added contribution to GDP**—this measures the contribution to the economy of each individual producer, industry, or sector in the UK.
- **Employment**—this is measured on a headcount basis, to allow for comparisons with employment data for other businesses and industry sectors and regions sourced from the Office for National Statistics (ONS).
- **Tax revenues.**

Note: this study is undertaken on a *gross* rather than a *net* basis. This means it focuses on the economic activity created by the resources the poultry industry uses, rather than only what they create *in excess of being deployed in their second-best usage*. It also ignores the displacement of activity from other industries, and any substitution through time.

¹ The *farming*, or production, of poultry includes the raising and breeding of poultry, but excludes the production of eggs from poultry. The *processing* of poultry meat is defined using SIC code 10.12, which includes the operation of slaughterhouses engaged in killing, dressing, or packing poultry, the production of fresh, chilled, or frozen meat in individual portions, and the rendering of edible poultry fats. It does not include the primary breeding sector, which instead lies in the poultry meat sector's supply chain.

Fig. 1. Overview of economic impact assessment model



2. DIRECT IMPACT OF THE POULTRY MEAT INDUSTRY

In this chapter, we examine the impact of the British poultry meat industry's own activities on the UK economy in 2023, known as its direct impact. We begin by assessing the industry's gross value added contribution to GDP in 2023, and subsequently explore the industry's direct contributions to employment and tax revenues.

2.1 DIRECT CONTRIBUTION TO GDP

In 2023, the poultry meat industry earned £10.3 billion in turnover. More than a third (34%) of this was produced by poultry farmers, who raise chickens, turkeys, ducks, and geese.² The remaining 66% was produced by poultry processors, who slaughter, clean, prepare, and create poultry food products.³

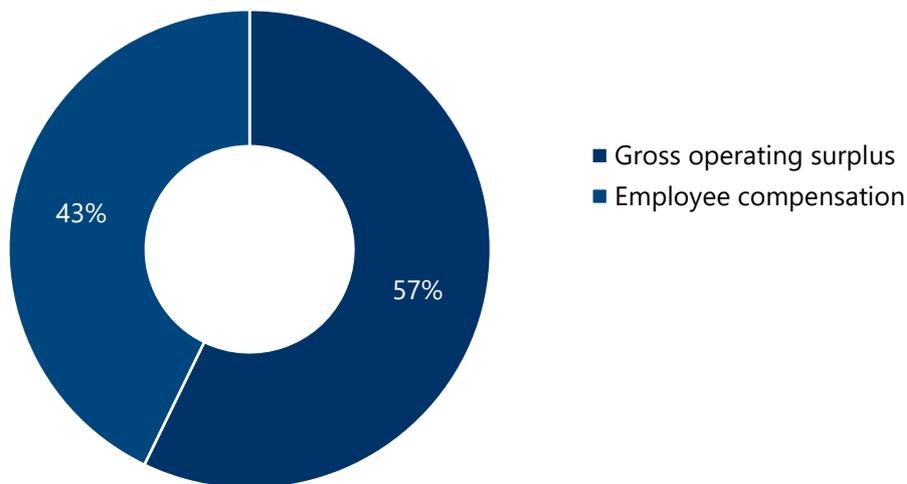
Through these activities, we calculate the poultry meat industry created an estimated £2.8 billion gross value added contribution to UK GDP. Around £1.2 billion of this gross value added (43%) was created by the poultry farming sector. The remaining £1.6 billion (57%) can be attributed to the poultry processors. Poultry processors typically make a larger contribution than the poultry farmers.

Looking at the composition of the industry's gross value added contribution, some £1.2 billion (or 43%) was made up of gross operating surplus, while the remaining £1.6 billion (or 57%) was comprised of employee compensation (Fig. 2).

² DEFRA. 2024. [Agriculture in the United Kingdom 2023](#).

³ ONS. 2025. [Non-financial business economy, UK: Sections A to S](#).

Fig. 2. The poultry meat industry's gross value added composition, 2023

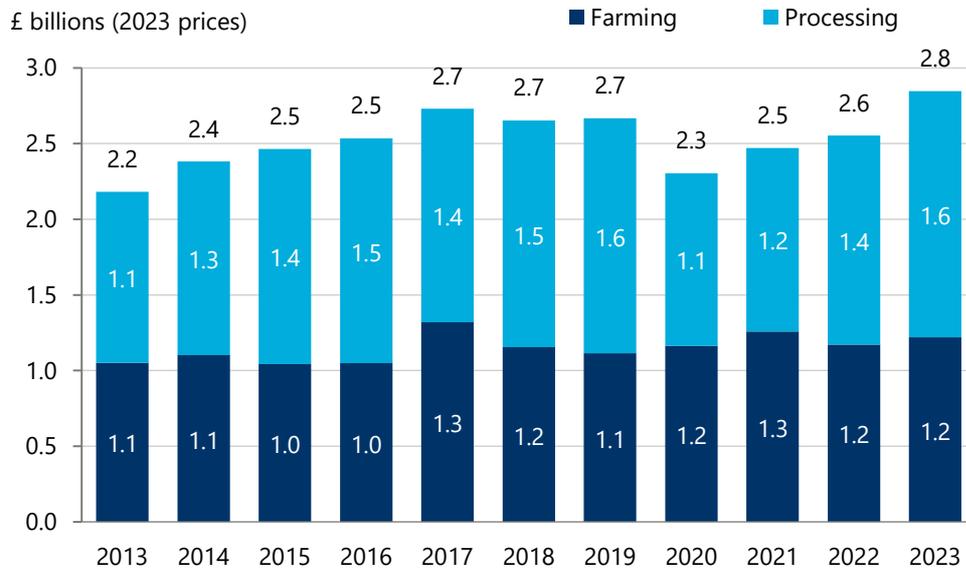


Source: Oxford Economics

Since 2013, the poultry meat industry's gross value added contribution to GDP has grown substantially, by some 31% in real terms. This equates to an average annual growth rate 2.7%. The industry's performance has been significantly stronger than that of the broader UK economy, which grew by just 17% over the same period in real terms, and also over 2.5 times faster than that of the UK agricultural industry, which has seen gross value added increase by some 12% in real terms since 2013.

In 2023, the poultry meat industry's gross value added contribution rose by 12% in real terms. This was driven by growth in the poultry processing sector's gross value added contribution, which grew by 18% (Fig. 3). The poultry farming sector's contribution to GDP rose by 4%.

Fig. 3. Poultry meat industry’s gross value added contribution to GDP, 2013-23 (real terms)^{4,5}



Source: Oxford Economics

The poultry meat industry’s direct contribution to GDP is particularly significant when examined within the context of the wider agricultural and meat processing industries. In 2023, poultry farming was responsible for 26% of the £4.7 billion gross value added contribution made by all livestock producers, and 9% of the £13.7 billion generated by the entire agricultural sector.⁶ In the same year, poultry meat processors generated 29% of the £5.7 billion gross value added contribution made by all meat processors (see Fig. 4, overleaf).⁷

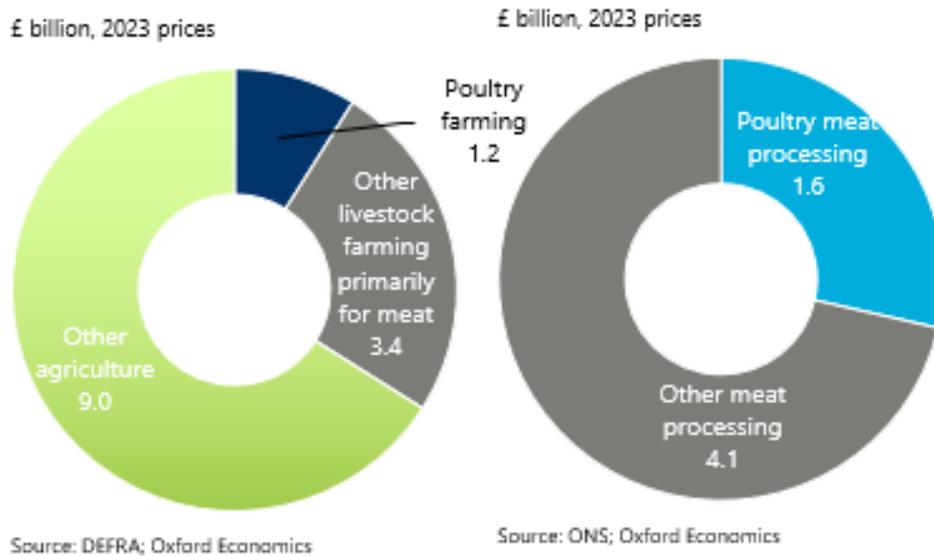
⁴ Gross value added is presented in constant 2023 prices, which have been adjusted to take account of inflation using the GDP deflator.

⁵ The sum of figures for the two parts of the industry may not equal the total due to rounding.

⁶ Figures may not sum due to rounding.

⁷ ONS. 2025. [Non-financial business economy, UK: Sections A to S](#).

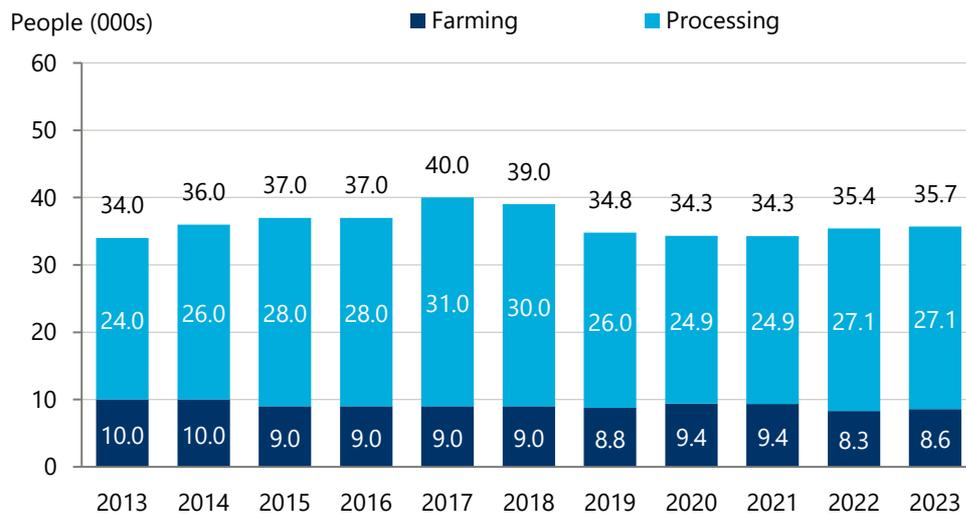
Fig. 4. Comparison of poultry meat industry’s gross value added to broader UK industries, 2023



2.2 DIRECT EMPLOYMENT CONTRIBUTION

In 2023, the poultry meat industry employed an estimated 35,700 people. Around 27,100 (76%) of these were employed in the poultry meat processing sector, while the remaining 8,600 employees (24%) worked in the poultry farming sector (Fig. 5).

Fig. 5. Poultry meat industry employment, 2013-23



Source: Oxford Economics

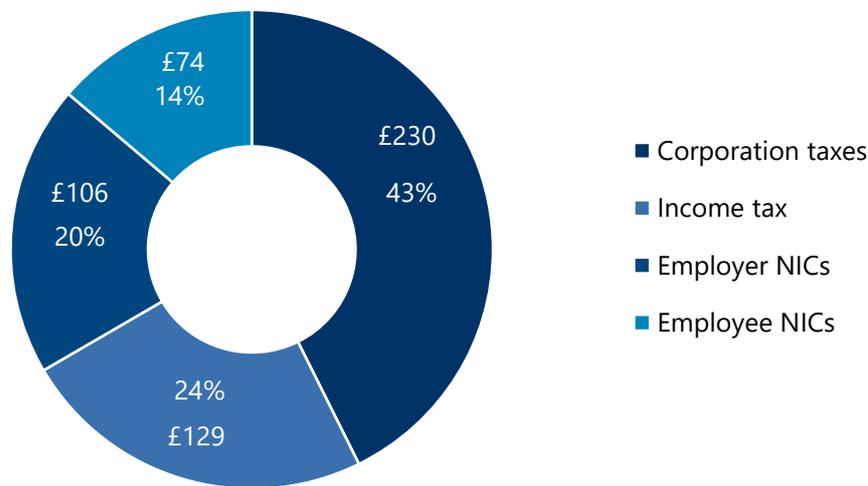
2.3 DIRECT TAX CONTRIBUTION

The poultry meat industry’s direct economic activity generates considerable tax revenues every year. These contributions to the Exchequer are used to finance essential public services.

We estimate that, in 2023, the poultry meat industry directly generated £539 million in tax revenues. This contribution is estimated to comprise £230 million in corporation taxes, and £309 million (59%) in employment taxes including income tax, and employee and employer National Insurance Contributions (NICs)⁸—see Fig. 5.

Fig. 6. Breakdown of tax contributions made by the poultry meat industry, 2023

£ billions (2023 prices)



Source: Oxford Economics

⁸ Taxes have been estimated using corporate tax rates from HM Revenue and Customs, 2024. [Annual UK Corporation Tax Statistics 2023](#). Income and National Insurance Contribution allowances and rates from HMRC’s online guidance on current rates and thresholds.

3. INDIRECT AND INDUCED IMPACTS OF THE POULTRY MEAT INDUSTRY

In this chapter, we examine the wider benefits of the British poultry meat industry's expenditure throughout the wider UK economy. We present estimates of the economic activity supported by the industry's procurement of goods and services in its supply chain (the indirect impact), and by the wage-related spending of employees within the industry and its supply chain (the induced impact).

3.1 INDIRECT IMPACT

In addition to generating gross value added, employment, and tax revenues through its own operations, the poultry meat industry stimulates economic activity through its procurement of goods and services from UK suppliers. This indirect impact has been estimated using Oxford Economics' suite of input-output models, which have been constructed from national accounting data published by the ONS.⁹

The poultry meat industry spent an estimated £4.3 billion on inputs of goods and services from UK suppliers in 2023.¹⁰ An estimated £2.3 billion (54%) of this total was spent by the poultry farming sector. The remaining £2.0 billion (46%) was spent by firms in the poultry meat processing sector.

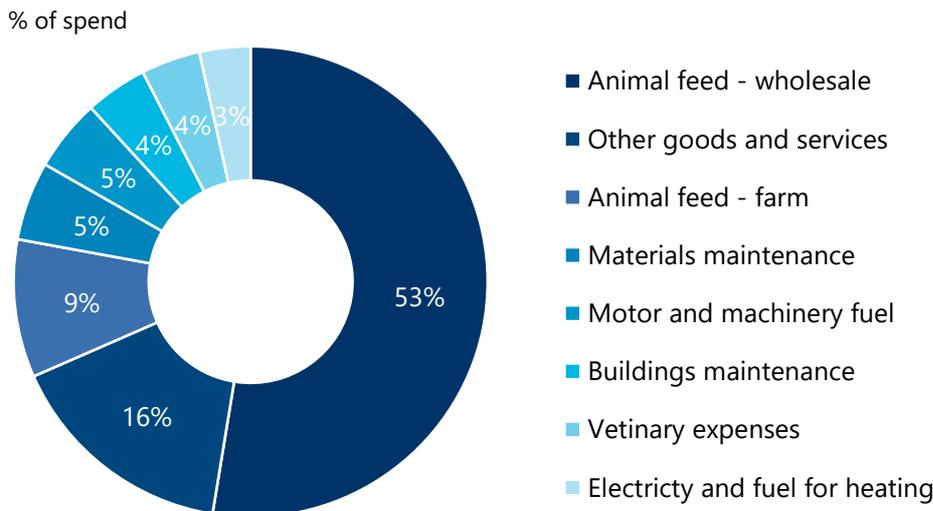
For poultry farmers, animal feed was the largest expenditure in 2023. Some 62% of their total spending by value went on animal feed (see Fig. 7, overleaf), of which the majority was sourced from wholesalers. Spending on materials maintenance and motor and machinery fuel (both 5%) also absorbed a significant budget share.¹¹

⁹ ONS. 2025. [United Kingdom Input-Output Analytical Tables, 2022](#).

¹⁰ This procurement figure only includes purchases made from other industrial sectors. To avoid double counting, we have excluded purchases made from other poultry farmers and processors, as this revenue has already been counted in the direct gross value added estimates. Total spending, including that with their own sectors and imports, totalled an estimated £7.5 billion in 2023.

¹¹ DEFRA. 2024. [Agriculture in the United Kingdom 2023](#).

Fig. 7. Estimated breakdown of the poultry farming sector’s procurement spending, 2023

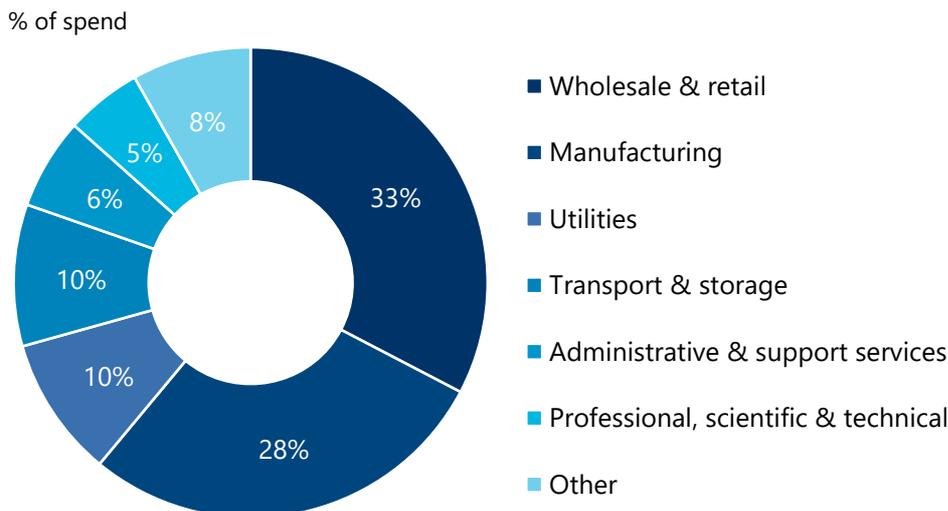


Source: Oxford Economics

The poultry meat processing sector’s procurement profile was more widely distributed across UK industries than that of the poultry farming sector in 2023 (see Fig. 8).¹²

By value, the largest share (33% of total expenditure) was spent with wholesalers and retailers. Procurement from manufacturers rank second at 28%. Another 10% was spent on utilities (including electricity, gas, and water).

Fig. 8. Estimated breakdown of the poultry meat processing sector’s procurement spending, 2023



Source: Oxford Economics

We calculate that the poultry meat industry’s procurement of goods and services supported a £3.2 billion gross value added contribution to UK GDP in 2023. This expenditure impact

¹² The poultry meat processing sector’s expenditure distribution has been estimated using the ONS’s input-output analytical tables for 2020. ONS. 2025. [United Kingdom Input-Output Analytical Tables, 2022](#).

benefitted a wide range of industries across the UK economy, with the largest contributions being enjoyed by the retail & wholesale (27%), manufacturing (20%), and professional services sectors (11%).

Through this supply chain spending, we estimate that the poultry meat industry sustained more than 47,500 jobs throughout the UK economy in 2023. The economic activity and jobs supported along the industry's supply chain also generated tax revenues of £722 million. These have been estimated using HMRC data on tax allowances and receipts, and ONS statistics on the average profitability and wage payments of each industry.

3.2 INDUCED IMPACT

The final channel of economic impact considered in this study is the induced impact of the poultry meat industry. This channel captures the GDP, jobs, and taxes supported by the wage-financed consumption of employees within the poultry meat industry, and also those employed by firms in the industry's supply chain.

The poultry meat industry paid its employees an estimated £1.1 billion in gross wages in 2023.

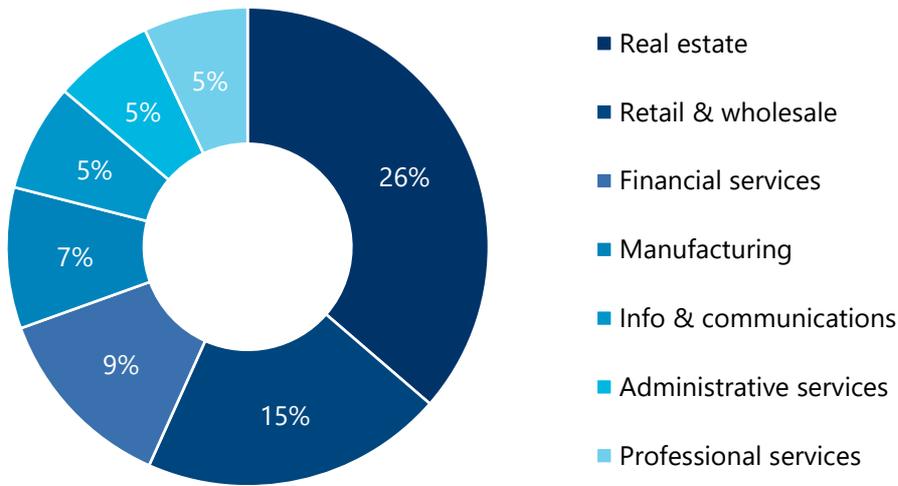
These workers, and those who were employed in the industry's supply chain, spent a proportion of their wages on the purchase of goods and services in the UK for their household's consumption (the remainder is spent outside the UK, or saved). In turn, this spending supported economic output and jobs at the firms in the consumer economy that supplied these purchases, and also throughout their own UK supply chains.

We calculate that this wage-financed spending stimulated a gross value added contribution to GDP of £2.4 billion in 2023. Moreover, this economic activity sustained some 30,300 jobs across the UK. The sectors benefitting from the largest boost to economic output through this impact channel were real estate, retail & wholesale, and financial services (see Fig. 9).

In addition, we estimate that this induced economic output and employment generated some £670 million in tax revenues in 2023. (Encompassing corporation taxes, labour taxes such as income tax and NICs, and taxes on production and products, these tax contributions were estimated following the same methodology as for the indirect tax impacts).

Fig. 9. Estimated breakdown of the induced (wage-financed) gross value added by sector, 2023

% share



Source: Oxford Economics

4. THE TOTAL ECONOMIC IMPACT OF THE POULTRY MEAT INDUSTRY

0.3%

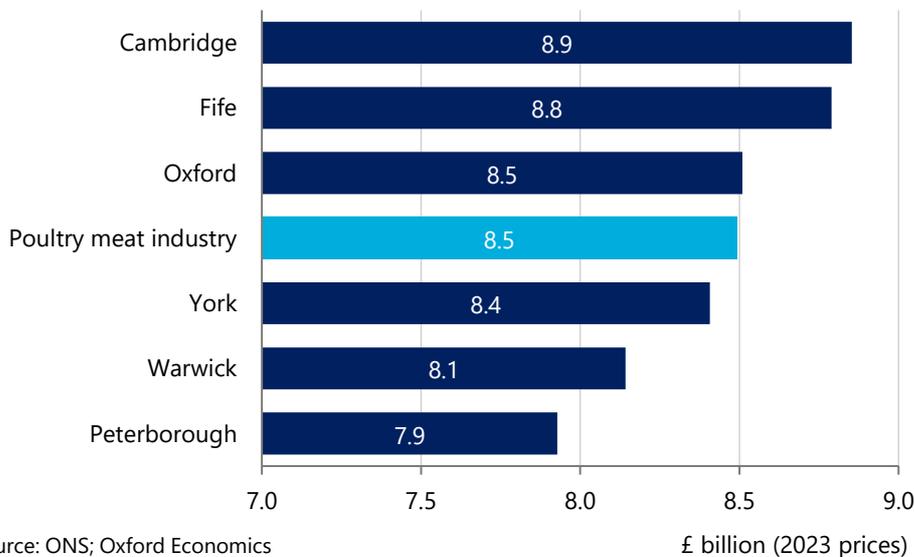
Proportion of the UK's total GDP that was contributed by the British poultry meat industry in 2023.

The industry supported a gross value added contribution of £8.5 billion.

We now bring together the findings of Chapters 2 and 3, to calculate the total economic impact of the British poultry meat industry in 2023.

Our economic impact assessment model shows that the industry supported a total gross value added contribution to UK GDP of £8.5 billion. This has been estimated by summing the industry's direct, indirect, and induced channels of impact for that year. This contribution is equivalent to 0.3% of the UK's total GDP in 2023.¹³ Or to give an alternative sense of scale, it is greater than the gross value added produced in York or Warwick (see Fig. 10) in 2023.

Fig. 10. Fig. 10. The poultry meat industry's total contribution to UK GDP compared to similar-sized cities, 2023



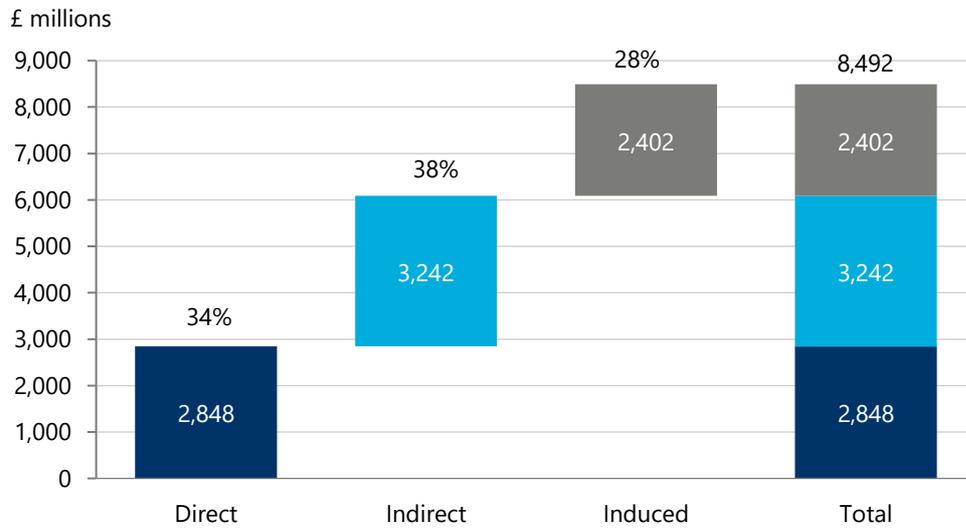
Source: ONS; Oxford Economics

£ billion (2023 prices)

The share of this total impact, some 34% (£2.8 billion) was generated directly by the poultry meat industry itself. The remaining 66% (£5.6 billion) was supported in other UK sectors by the industry's supply chain spending on inputs of goods and services, and by the wage-related spending of the industry's employees and those in its supply chain (see Fig. 11). This means that the poultry meat industry had a GDP multiplier of 3.0 in 2023. In other words, for every £1 million of gross value added created by the industry, a further £2.0 million was supported elsewhere in the UK economy that year.

¹³ ONS. 2025. [Gross Domestic Product at market prices: Current price: Seasonally adjusted £m](#)

Fig. 11. The poultry meat industry's total contribution to UK GDP, 2023



Source: Oxford Economics

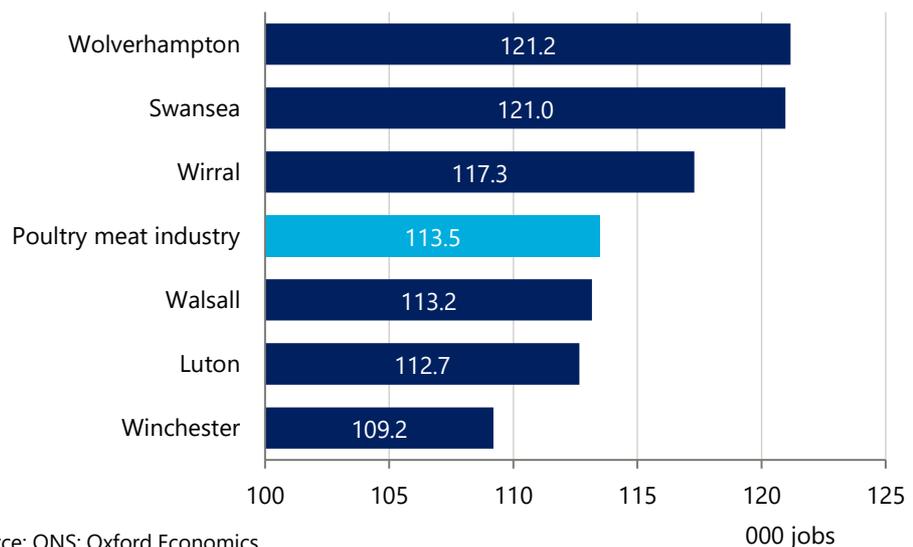
Combining our direct, indirect, and induced estimates for employment, we find that the poultry meat industry supported a total of 113,500 jobs throughout the UK in 2023. This is equivalent to 0.3% of the UK's total employment that year.¹⁴ Alternatively, it is similar to the numbers employed in Luton or Walsall (see Fig. 12).

113,500

The number of jobs that the poultry industry supported in 2023.

The British poultry meat industry supported 0.3% of total UK employment in that year.

Fig. 12. The poultry meat industry's total employment impact compared to similar-sized regions, 2023



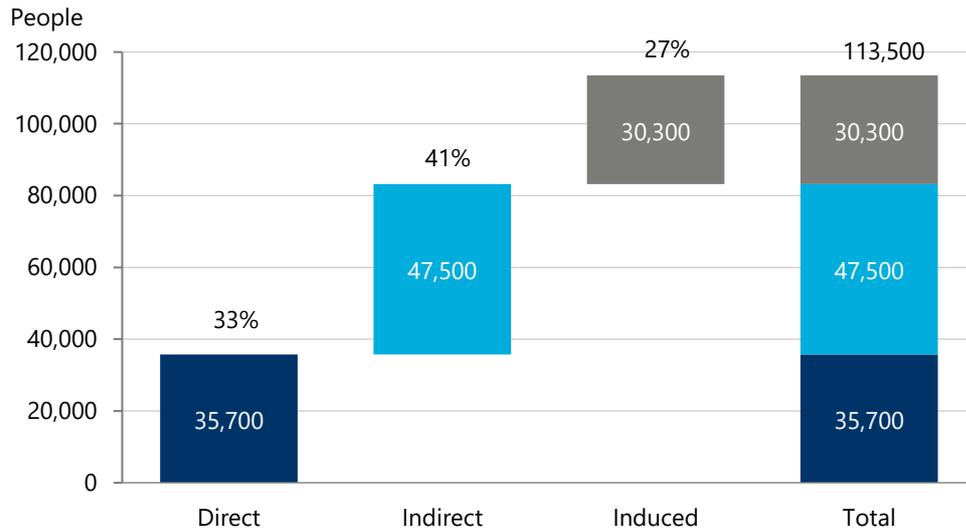
Source: ONS; Oxford Economics

The share of this employment, 35,700 jobs (33% of the total), was within the industry itself. The remaining 77,800 jobs were supported by the poultry meat industry's procurement of goods and services, and by the payment of wages to its employees and to those in its supply chain (see Fig. 13).

¹⁴ ONS. 2025. [Number of People in Employment \(aged 16 and over, seasonally adjusted\):000s](#)

This means the poultry meat industry had an employment multiplier of 3.2. In other words, for every 100 jobs in the industry, a further 220 were supported elsewhere in the UK economy that year.

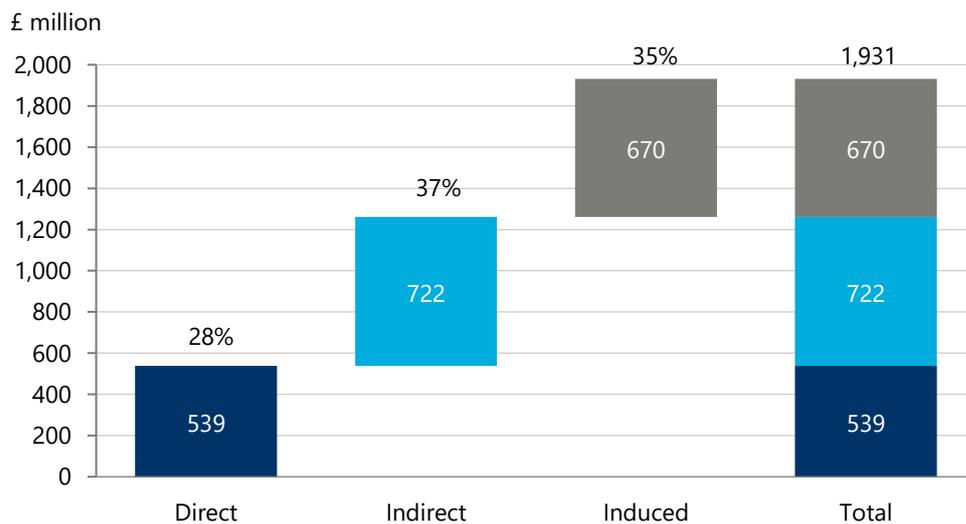
Fig. 13. The poultry meat industry’s total employment impact, 2023



Source: Oxford Economics

Finally, we estimate that the total economic output and employment sustained by the poultry meat sector generated £1.9 billion in tax revenues in 2023. To give context to this figure, it is equivalent to 32% of all the public sector expenditure on services to agriculture, fisheries, and forestry in the 2022/23 financial year.¹⁵

Fig. 14. The poultry industry’s total tax impact



Source: Oxford Economics

¹⁵ HM Treasury. 2025. [Public Expenditure Statistical Analyses 2025](#). Table 4.2.



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