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ENVIRONMENT · CARBON · PUBLIC AFFAIRS
NORTHERN IRELAND

DRAFT
BRIEFING PAPER
21 November 2026

The poultry life cycle in Northern Ireland

Feed, phosphorus, eggs and every part of the bird: what officials, politicians and food businesses need to know before the deforestation rule starts and the next nutrients programme is made.

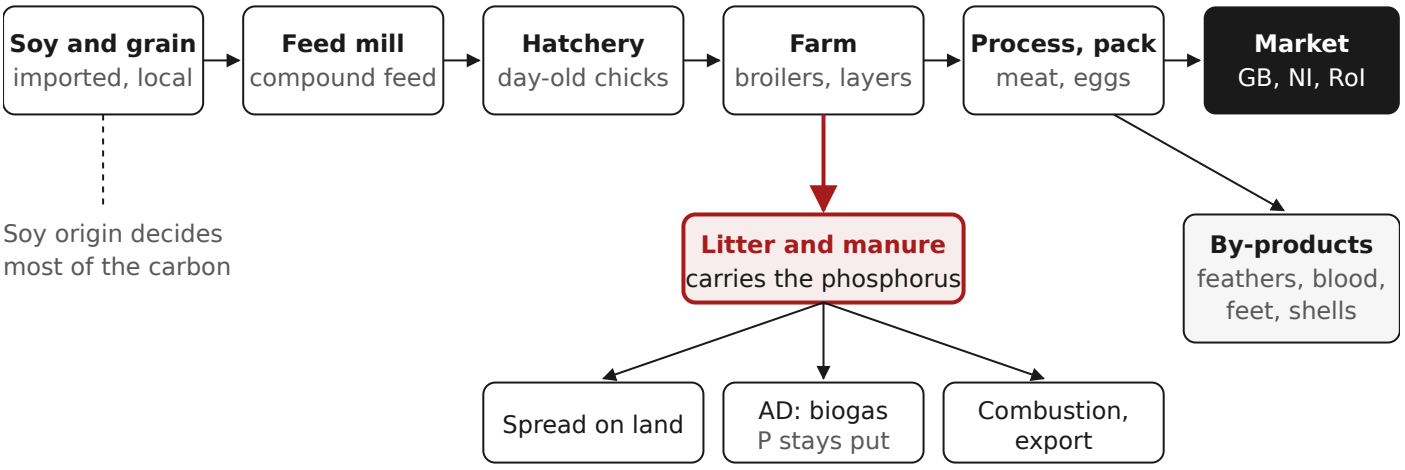
25.8m
birds on NI farms, June 2025 (+9%)
DAERA census

£620m
poultry meat and egg output, 2024: 19.4% of NI farming
DAERA

27%
of UK egg intake goes through NI packers, Q3 2026
Defra

30 Dec
2026: EU Deforestation Regulation applies to soya meal in NI
GOV.UK

THE LIFE CYCLE AT A GLANCE



THE CENTRAL TRADE-OFF

Chicken's low carbon per kilogram is real, but in Northern Ireland it is bought with imported soy, ammonia and a phosphorus surplus concentrated in one catchment. Pushing diets toward poultry for climate reasons, without fixing feed origin and litter, moves the problem from the atmosphere to the water.

2 Summary and the sector at a glance
3 Structure, markets and demand
4 Feed and carbon
5 Phosphorus, ammonia and Lough Neagh
6 Disease, food safety and health
7 The whole bird and eggshells
8 Regulation and trade
9 Opportunities, risks and questions

Draft for discussion. Figures marked [check] are not yet confirmed against a primary source. Regulatory status is given as at 21 November 2026. Not legal, tax or veterinary advice.

Summary

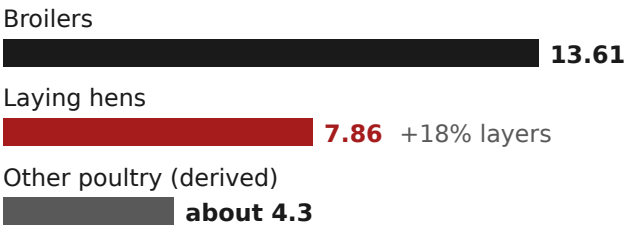
Poultry is Northern Ireland's growing livestock sector, an export industry selling mainly to Great Britain, and the farm sector most tied to the phosphorus crisis in Lough Neagh.

1. **Growth is in eggs.** Laying birds rose 18% in a year; broilers 1%.
2. **Value.** Meat £356m and eggs £264m: 19.4% of NI farm output in 2024.
3. **NI packers handle over a quarter** of UK egg intake (Q3 2026). Intake is not production.
4. **One dominant broiler integrator,** Pilgrim's Europe (Moy Park), sets terms for hundreds of farms.
5. **Phosphorus and ammonia are the NI problems,** not carbon. Final nutrients rules are not yet made.
6. **Feed is where the carbon is.** The EU Deforestation Regulation applies to soya meal from 30 December 2026.
7. **Bird flu is seasonal.** All NI birds have been housed since 19 November 2026.
8. **Waste is undervalued.** Litter, feathers, feet and shells have markets NI barely uses.

What it means: feed traceability, litter and ammonia will decide the sector's licence to grow more than demand will. Demand is strong.

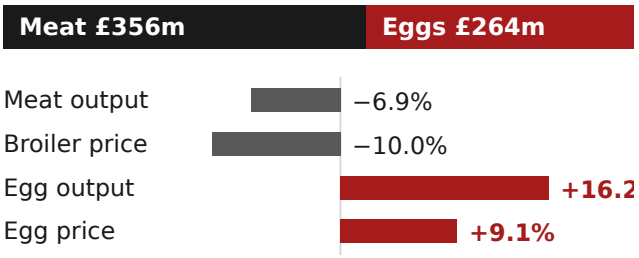
The sector at a glance

BIRDS ON NI FARMS, JUNE 2025 (MILLIONS)



Total 25.8m (+9%), DAERA census. Species counts from press reports [check census tables].

OUTPUT VALUE 2024 AND CHANGE ON 2023



DAERA Statistical Review 2024. The broiler price is a liveweight price, not growers' income.

MEASURE	FIGURE	PERIOD	SOURCE
Poultrymeat production	338,067 t liveweight	2024	DAERA
Graded packing station throughput	170.4m dozen	2024	DAERA
Free-range share of throughput	83.9%	2024	DAERA
Intake at NI packing stations	72.4m of 265.0m dozen UK	Q3 2026	Defra Table 4
Poultry feed delivered	78.1 thousand t	May 2026	DAERA feed statistics
Poultry businesses	957	June 2024	DAERA census

Defra's quarterly intake and DAERA's annual throughput use different definitions and should not be compared [reconcile with DAERA statisticians]. Packing may include eggs from Republic of Ireland flocks.

Structure, markets and demand

Broilers are grown on contract. Pilgrim's Europe (Moy Park, owned by Pilgrim's Pride, majority-owned by JBS) says it works with over 450 NI farmers [company claim], processing at Dungannon and Ballymena. Turkey and duck chains are separate. Egg packers also contract layer farms on placement, price formula and contract length.

WHO CARRIES WHAT IN A BROILER CONTRACT

Integrator

- Owns the birds and the feed
- Runs feed mill, hatchery, processing
- Sets the performance formula (feed conversion, mortality)
- Sells to GB retail and food service

chicks, feed →

← grown birds

fee per bird or kg

Contract grower

- Capital debt on sheds and heating
- Energy and labour
- Bedding and litter removal
- Planning and ammonia risk
- Unpaid gaps and clean-out time

Typical terms; not from a published contract [check against a sample contract or the UFU].

WHERE NI HEN EGGS GO



RoI 3%

Press figure [check against DAERA]

UK SELF-SUFFICIENCY, 2025



PRODUCT	MAIN MARKET	DEMAND SIGNAL
Poultry meat	GB retail and food service	UK production 2,000 kt in 2025 (table chicken 1,860 kt); imports 700 kt (Defra AUK 2025)
Hen eggs	GB, NI, small RoI share	UK supply 1,209m dozen in 2025 (Defra)
Turkeys	Christmas; craft bronze birds	NI output 3,065 t liveweight, 2024 (DAERA)
Duck	Restaurants, retail, export	About 70% of Irish duck meat exported [Teagasc; check]
Geese, guinea fowl, quail	Christmas and specialist trade	Niche; no NI volumes found

ENERGY AND THE RHI

Many broiler houses were heated by biomass boilers under the non-domestic Renewable Heat Incentive. Tariff cuts and closure left growers with financed boilers and less income. It still shapes their trust in government energy schemes [check poultry share in DfE's RHI data].

CROSS-BORDER CHAIN

Birds, feed, product and litter cross the border routinely. The Republic sent about €62m of primary poultry to NI in 2025 [Bord Bia via press]. Silver Hill Duck (UK) Ltd is registered in Moira; the business farms in Co Monaghan (Companies House).

Feed and carbon

Chicken is low-carbon meat; its feed is not low-risk. For chickens, emissions come mainly from producing feed and from manure (FAO). Soy is the hotspot, and where it was grown matters more than how much is used.

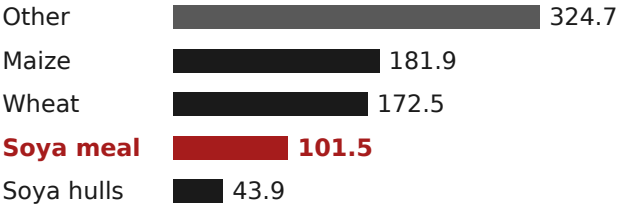
POULTRY FEED DELIVERED, MAY 2026



Broiler 37.4 kt · Layer, breeder 34.6 · Chick 3.7 · Turkey, other 2.4

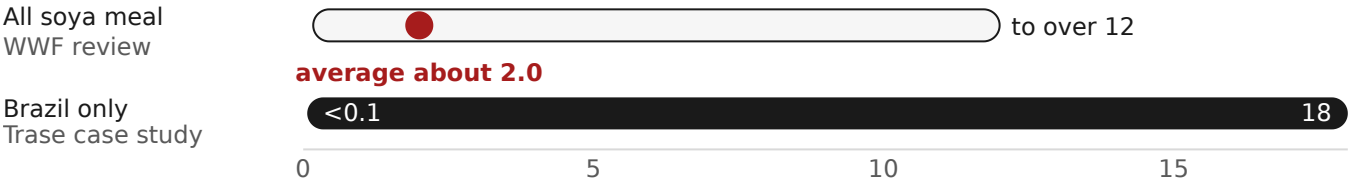
Total 78.1 thousand t. DAERA feed statistics.

NI COMPOUND FEED RAW MATERIALS, Q1 2026 (KT)



All livestock, of 824.5 kt. DAERA does not publish soya use by species.

SOYA MEAL FOOTPRINT DEPENDS ON ORIGIN (KG CO2E PER KG)



Land conversion for feed can be 40 to 70% of poultry's climate impact [Trase and AdAstra; check]. No honest NI soy tonnage can be calculated: mill inclusion rates and cargo origins are not published.

WHOSE EMISSIONS ARE THEY?

NI inventory

Manure | Energy

Product footprint

Manure | Energy | **Soy land use**

Land clearing counts where the soy grows. GB retailers will ask for both.

EU DEFORESTATION REGULATION IN NI



30 Dec 2026
medium, large

30 Jun 2027
micro, small

In scope: soya beans, flour and meal, oil, oil-cake (HS 2304). **Not listed:** compound feed (HS 2309). The duty falls on importers and compounders; integrators and packers will face retailer requests for evidence. DAERA is competent authority (GOV.UK, updated 11 Nov 2026).

LEVERS

Verified soy
deforestation-free, from low-risk origins

Home-grown protein
rapeseed meal, peas, beans

Animal protein
EU law allows pig PAP in poultry feed [NI practice to confirm]

Efficiency, phytase
less feed, less phosphorus

Phosphorus, ammonia and Lough Neagh

Excess phosphorus is the main cause of water quality problems in Lough Neagh and across NI, according to DAERA. Decades of surplus have also built up soil phosphorus that will keep leaching for years even if inputs stop [cite AFBI].

>60%
of phosphorus in Lough Neagh comes from agriculture
Lough Neagh action plan [cite DAERA/AFBI]

+55%
river soluble reactive phosphorus, 2012 to 2022
press report of DAERA [check]

93%
of NI ammonia comes from agriculture
DAERA, 2018

POULTRY LITTER AGAINST LAND CAPACITY (T A YEAR)

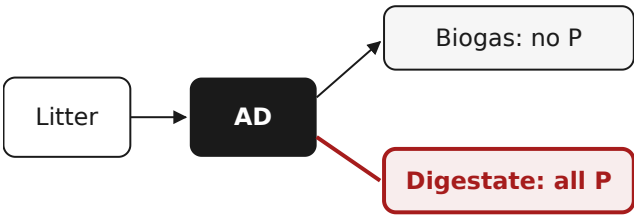
Produced
260,000

Land can take
100,000 | **surplus 160,000**

Assembly Hansard, 15 May 2012

2012, before litter export and AD expanded. No current official figure found.

AD MOVES PHOSPHORUS; IT DOES NOT REMOVE IT



in catchment: load st

LITTER OFF LAND: CLAIM AND CHALLENGE

Company: Pilgrim's Europe says 80% of its NI litter goes off land, mostly to AD, with all broiler litter off land by 2028.

Challenge: The Detail reports supplying farms spread 20 times the 1% agreed with NIEA in July 2025 [cite the company's response].

The figures may measure different things. Neither can be tested until NIEA publishes the agreement and monitoring data. Some litter goes to the Republic, moving the load across the border.

CAMPAIGN ESTIMATE, NOT OFFICIAL

Friends of the Earth NI estimates poultry manure caused 63% of the rise in phosphates since 2012, and that 64% of NI poultry sit in the Lough Neagh catchment (July 2026).

Not yet compared with AFBI's source apportionment. Do not quote as fact.

RULES IN TRAIN (STATUS AS AT 21 NOVEMBER 2026)

Feb–May 2025
Ammonia Strategy
consultation [final?]

Jun–Sep 2026
NAP 2027–2030
consultation closed

15 Dec 2026
Biomethane Strategy
consultation closes

Not yet
NAP regulations
made

New sheds need an ammonia assessment against designated sites, the main brake on expansion. Units above 40,000 bird places need a pollution prevention and control permit.

THE HARD CONCLUSION

On current evidence, more birds in the Lough Neagh catchment cannot be reconciled with cutting phosphorus unless litter and digestate leave the catchment or the phosphorus is recovered.

Disease, food safety and health

BIRD FLU: HOUSING IS NOW A SEASONAL FACT OF LIFE



DAERA announcements and latest situation page.

EGGS: THE HEALTH CASE

The NHS sets **no limit** on how many eggs people eat; cook them without added salt or fat. For most people, saturated fat affects blood cholesterol more than cholesterol in food (NHS; BHF).

Protein | Vitamin B2 | Vitamin B12 | Vitamin D | Iodine | Selenium

People with familial hypercholesterolaemia should follow clinical advice.

CAMPYLOBACTER AND SALMONELLA

Campylobacter is the largest bacterial foodborne burden in the UK; raw chicken is a main source. UKHSA data for 2024 showed human cases of both in England exceeded the FSA's thresholds. The FSA does not blame more contaminated carcases, where earlier reductions have held (FSA, 25 June 2026).

No NI-specific figures were published.

WHICH EGGS CAN BE EATEN RUNNY (FSA)

EGG	LIGHTLY COOKED OR RAW	WHO
British Lion or Laid in Britain hen eggs	Yes	Everyone, including infants, pregnant women and older people
Other hen eggs	Cook thoroughly for vulnerable groups	Vulnerable groups
Duck, goose and quail eggs	**No: always cook thoroughly**	Everyone. Higher Salmonella risk.

HANDLING RAW CHICKEN (FSA)

1. **Don't wash it.** Splashing spreads bacteria.
2. **Cook until steaming hot** all the way through.
3. **No pink meat;** juices run clear.

CHICKEN MEAT

Plain chicken without skin is lean protein. Coated and processed chicken is judged as processed food. Unprocessed poultry sits outside IARC's red and processed meat classifications [quote IARC and NHS wording before publishing].

ANTIBIOTICS

Regulation (EU) 2019/6 on veterinary medicines bans routine preventive group treatment [check how it applies in NI under the Windsor Framework; get VMD usage figures].

The whole bird, by-products and eggshells

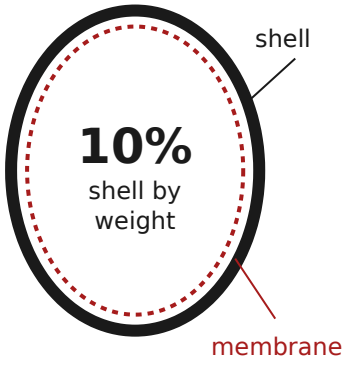
Every part of a bird or egg not sold as food is an animal by-product under Regulation (EC) No 1069/2009, which applies in NI. The category depends on the material, and decides the route.

BY-PRODUCT CATEGORIES AND WHERE THEY CAN GO

CATEGORY 1 · highest risk	CATEGORY 2	CATEGORY 3 · most value
Specified risk material, contaminated material	Manure and litter (Art 9(a)) Fallen stock Dead-in-shell chicks (9(f)(iv))	Feathers, blood (Art 10) Eggshells, infertile eggs, culled chicks (10(k)) Offal and fat
Incineration	**AD, compost, land under rules**	**Feed, pet food, fertiliser**

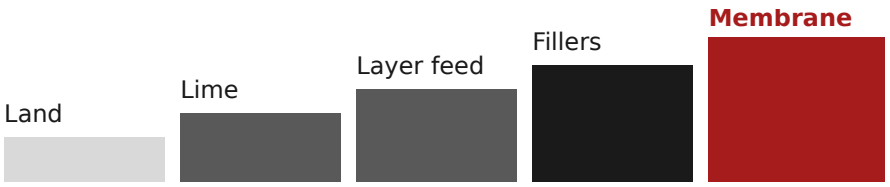
PART	MAIN ROUTES	MARKET OR USE
Breast, thighs, wings	Retail, food service	GB, NI and RoI retail; quick-service chains
Feet (paws)	Export	China and Asian markets [check current UK access]
Feathers	Hydrolysed feather meal	Pet food and aquafeed protein; fertiliser; trial fibres and bioplastics
Blood, offal, fat	Rendering	Blood meal; poultry fat for pet food and biofuel; processed animal protein
Litter and manure	Land, AD, combustion, export	Fertiliser; biogas; heat and power (ash as fertiliser)

EGGSHELLS: SMALL MATERIAL, REAL VALUE





USES, LOW VALUE TO HIGH



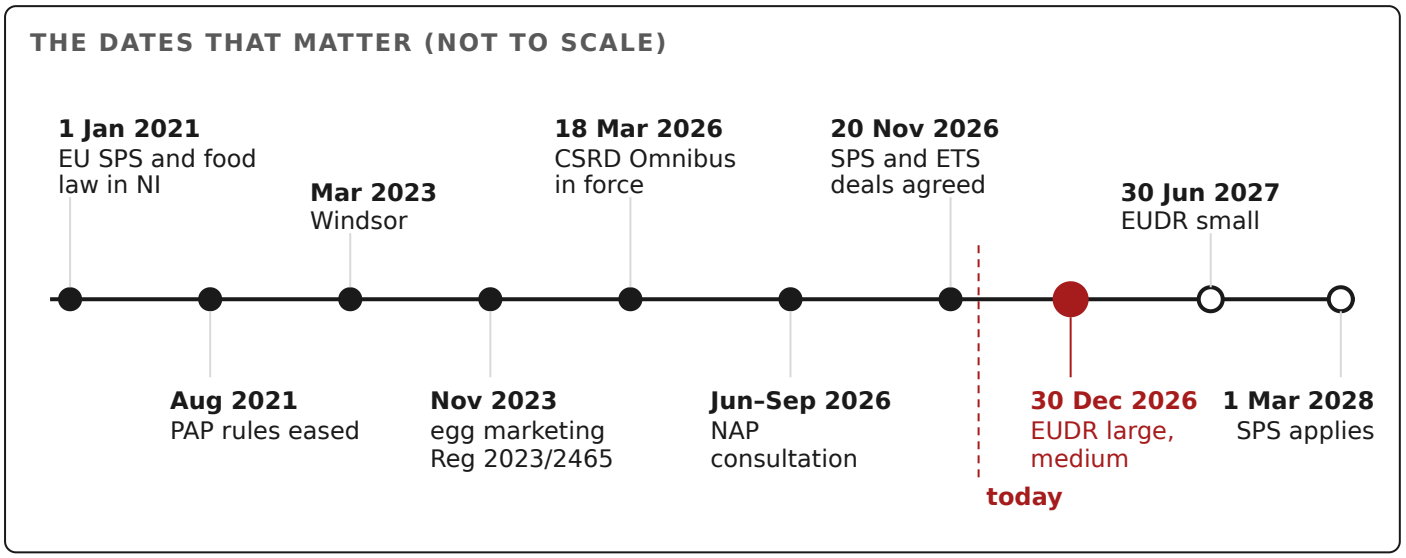
Shells from breaking plants and hatcheries are Category 3 and go to land only after processing. NI disposal routes, volumes and egg-breaking capacity are not published [check]. Household and catering shells cannot be collected at scale. Composition from standard literature [cite a review].

THE CARBON ANGLE

Rendering and AD cut emissions compared with landfill, and processed animal protein in feed displaces some soy. **Burning litter makes energy but returns no organic matter to soil; no single route for litter wins on both phosphorus and carbon.**

Regulation and trade (status as at 21 November 2026)

An NI poultry business works to EU product rules but sells heavily into GB and reports to GB retailers: EU rules on feed soy and eggs, and GB retailer carbon and welfare demands, all at once.



MATTER	STATUS AND DATE	WHAT IT MEANS FOR NI POULTRY
UK–EU SPS agreement	Agreed 20 Nov 2026; applies from 1 Mar 2028, subject to legislation and ratification	Most checks go; NIRMS not needed for most goods; dynamic alignment
EU Deforestation Regulation	30 Dec 2026 medium and large; 30 Jun 2027 micro and small	Soya meal in scope, compound feed not; DAERA competent authority
Animal by-products	Reg. (EC) 1069/2009 and Reg. (EU) 142/2011 apply in NI	Category rules for feathers, blood, shells, litter
Egg marketing	Reg. (EU) 2023/2465 applies in NI	Free-range label kept for the whole of a housing order; 16-week limit gone
Processed animal protein	Reg. (EU) 2021/1372	Pig PAP may go into poultry feed; NI practice to confirm
Nutrients Action Programme 2027–2030	Consultation closed 7 Sep 2026; regulations not yet made	Phosphorus protocols for poultry farms
Ammonia; PPC permits	Strategy consulted Feb–May 2025 [final?]; permit above 40,000 places	Ammonia assessment for new sheds near designated sites
Welfare	EU broiler and laying hen directives apply; EU revision pending [check]	Stocking density; enriched cages legal; retailers going cage-free
CSRD and ESRS	Omnibus I in force 18 Mar 2026; over 1,000 staff and €450m turnover	Applies to EU groups, not NI as such; value-chain data requests

FIVE WEEKS TO GO

From 30 December 2026, whoever first places soya meal on the NI market needs due diligence, plot geolocation and a due diligence statement. Integrators and egg packers buying compound feed carry no legal duty, but they will be asked for evidence by GB retailers.

Not legal advice. Check each line against current legislation before acting; take specialist advice where it matters to a contract or compliance decision.

Opportunities and risks

AREA	OPPORTUNITY	RISK
Feed	Home-grown protein, PAP, verified low-risk soy	Retailer demands for EUDR evidence from 30 Dec 2026; delisting
Phosphorus	Litter out of the catchment; phosphorus recovery; precision feeding	NAP limits; legacy soil phosphorus; Lough Neagh liability
Ammonia, planning	Low-emission housing, scrubbers, better siting	Assessments block new sheds near designated sites
Energy	AD and biomethane from litter	Digestate moves the phosphorus; growers' distrust after RHI
By-products	Eggshell calcium and membrane; feather protein	No local scale; Category 3 rules add cost
Health	Eggs as cheap, nutrient-dense protein; lean chicken	Campylobacter and Salmonella thresholds exceeded
Disease	Biosecurity and vaccination policy	Housing orders (one in force now), export bans

Questions for decision-makers

1. **DAERA:** will the final NAP set a farm-level phosphorus balance limit for poultry units, and track litter sent to AD to where the digestate ends up?
2. **DAERA and NIEA:** will the July 2025 NIEA–Pilgrim's Europe litter agreement and its monitoring data be published?
3. **DAERA:** when will AFBI's Lough Neagh source apportionment be published in full, with legacy soil phosphorus?
4. **Feed importers and compounders:** are EUDR systems ready for 30 December 2026, and where does NI soya meal come from?
5. **Retailers:** will footprints for NI chicken and eggs include land-use change from soy?
6. **DfE and DAERA:** how will the Biomethane Strategy treat digestate phosphorus?
7. **FSA:** what is the NI-specific Campylobacter and Salmonella picture?

OPEN CHECKS BEFORE PUBLICATION

- DAERA census and egg-survey tables
- Defra intake vs DAERA throughput; RoI eggs
- Soy diet inclusion and origin; hulls HS code
- NAP, Ammonia Strategy, Lough Neagh plan
- Grower contracts; RHI share for poultry
- Egg-breaking capacity; shell volumes
- Company response to The Detail
- Reg. 2019/6 in NI; soy footprint sources

HOW THIS PAPER WAS CHECKED

Two review panels tested the draft on 21 November 2026. A fact-check panel (statistician, environmental and food lawyer, carbon scientist) checked figures and law against primary sources. A practitioner panel (contract grower, egg packer, processor, DAERA official, Lough Neagh campaigner, dietitian) tested balance. Their corrections are made in this version.

Sources: DAERA, Defra, GOV.UK, FSA, NHS, NI Assembly Hansard, EUR-Lex and legislation.gov.uk, linked in the full text version. Press, campaign and literature figures are marked [check]. Not legal, tax or veterinary advice.