

Benefits and challenges of the Rural Poultry sector

Example of the French sector

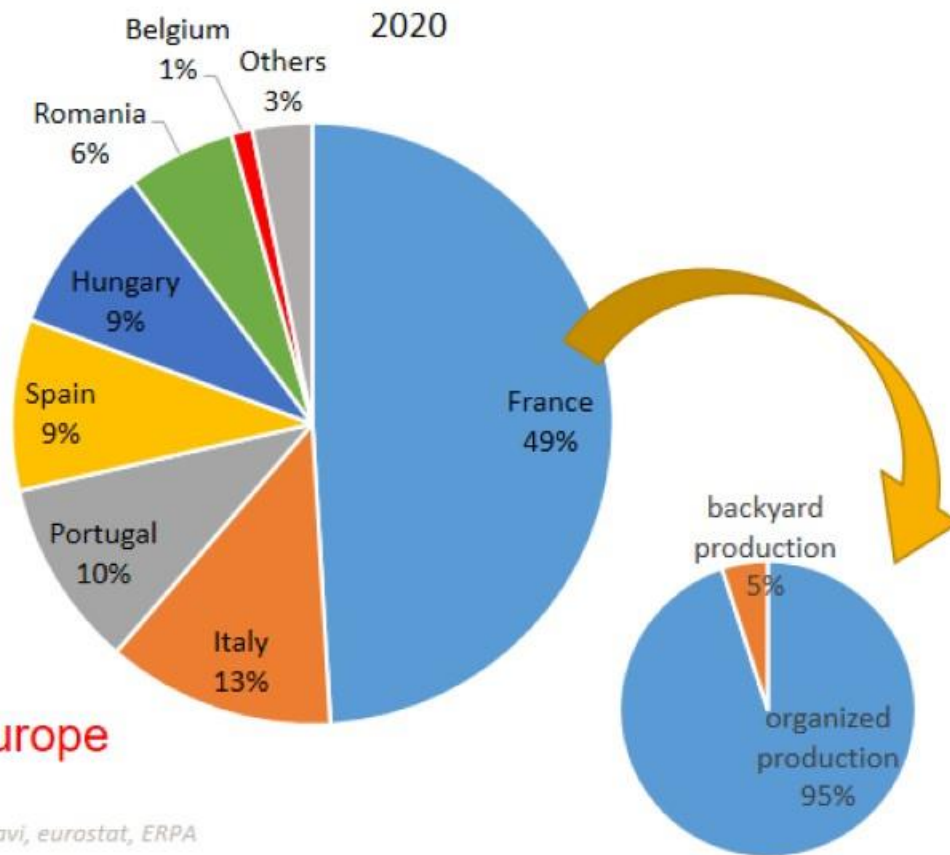
Mohamed BOUZIDI – March 30, 2022



Rural broiler production in Europe

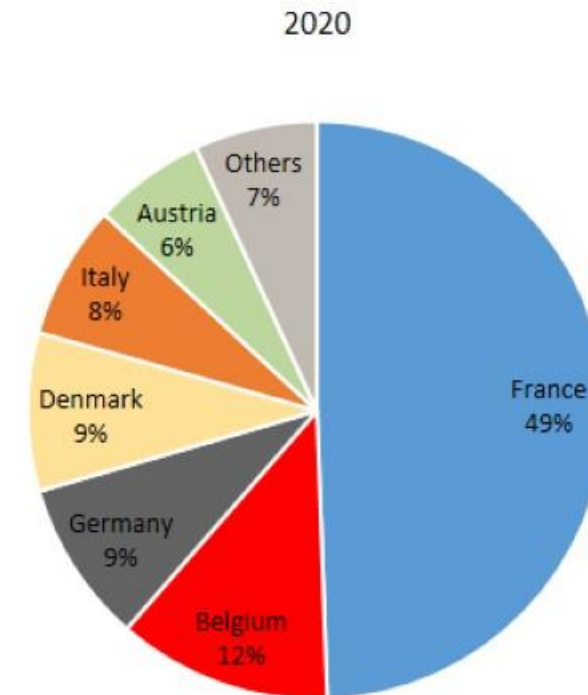
5~6% of broiler production... >90% of production is organized in France

Rural broiler production share in the EU



Southern Europe

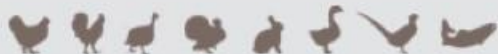
Organic broiler production share in the EU



Northern Europe

Source : Itavi, eurostat, ERPA

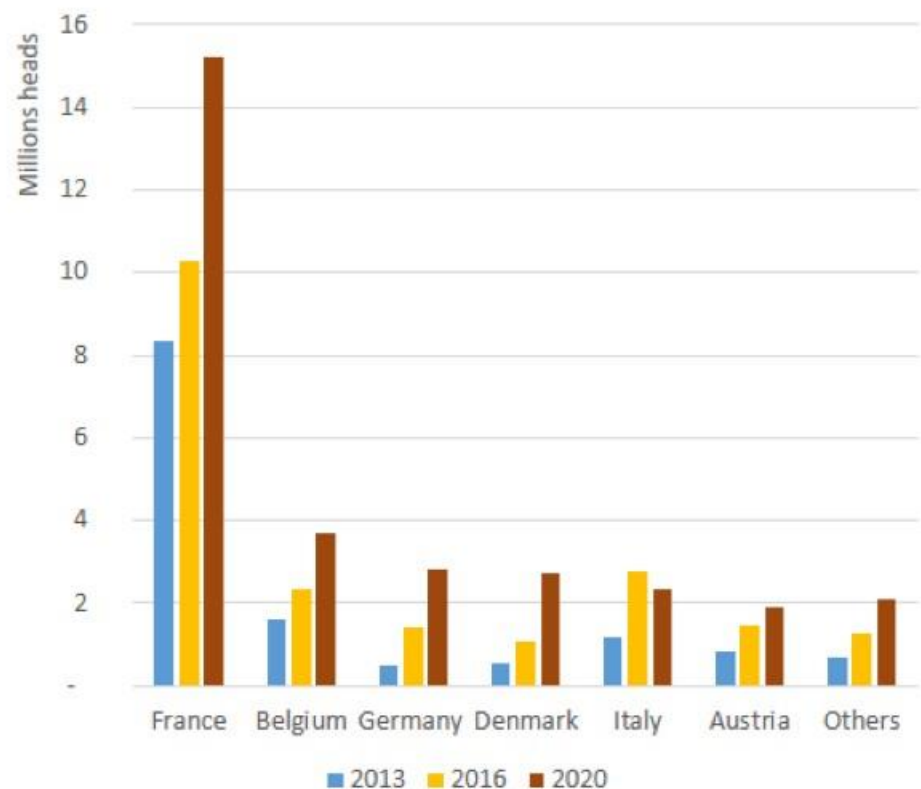
Source : Itavi, eurostat



Rural broiler production in Europe

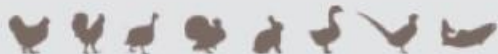
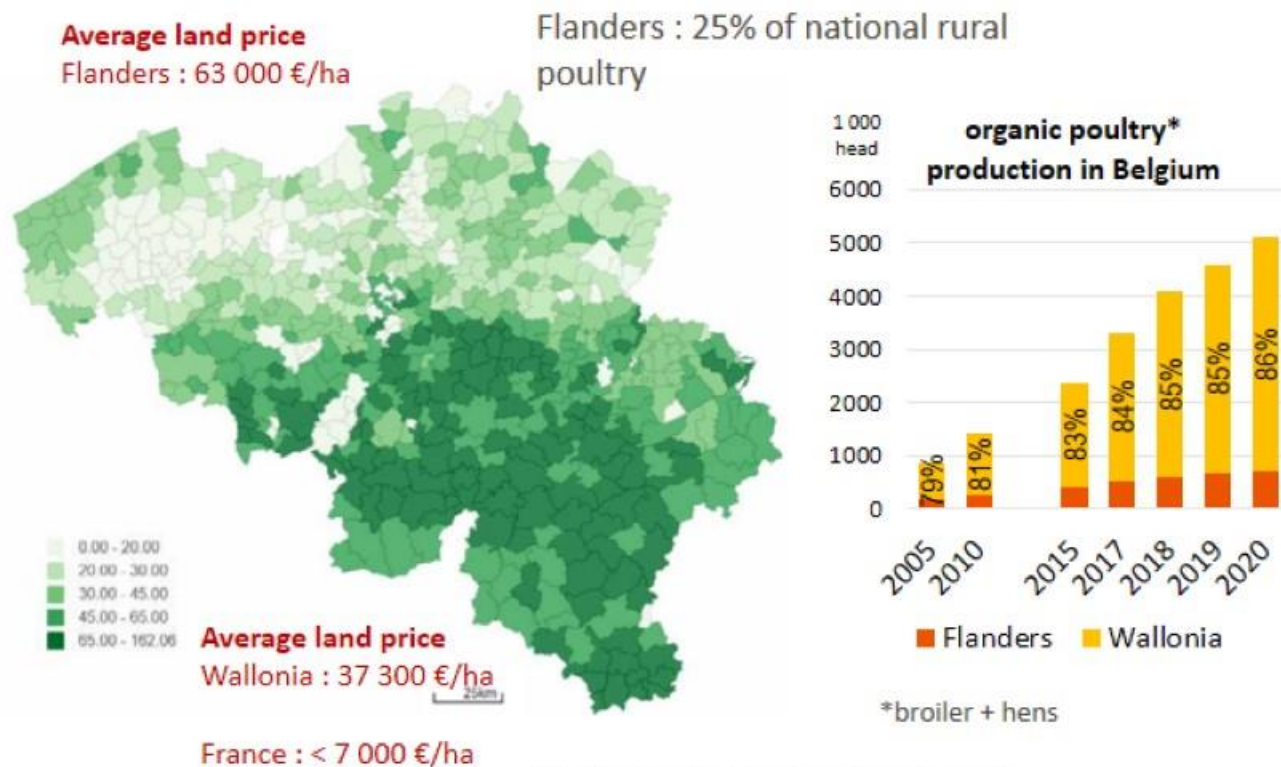
Organic production has doubled in 8y ... France contribute 40% of increase, 12% for Belgium

Evolution of the organic poultry production in Europe



Source : Itavi, eurostat, ERPA

Rural poultry production in Belgium... less availability of agricultural land in Flanders

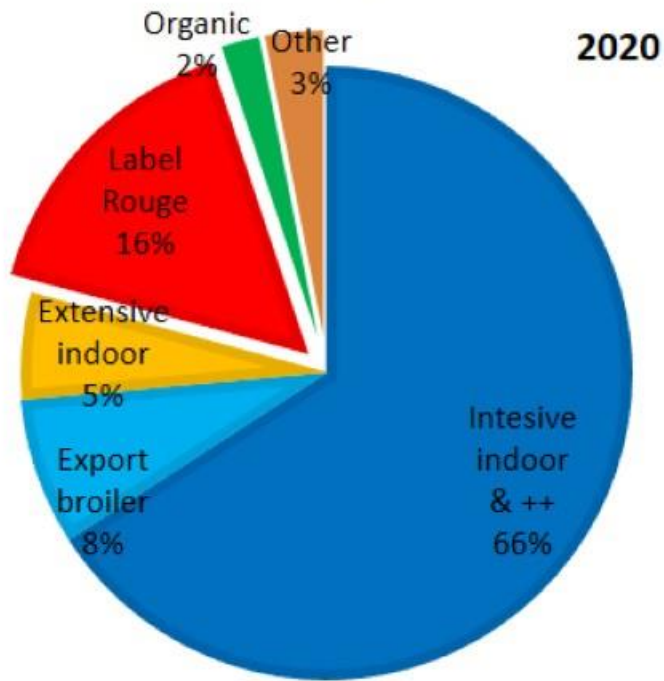


Focus on the French sector

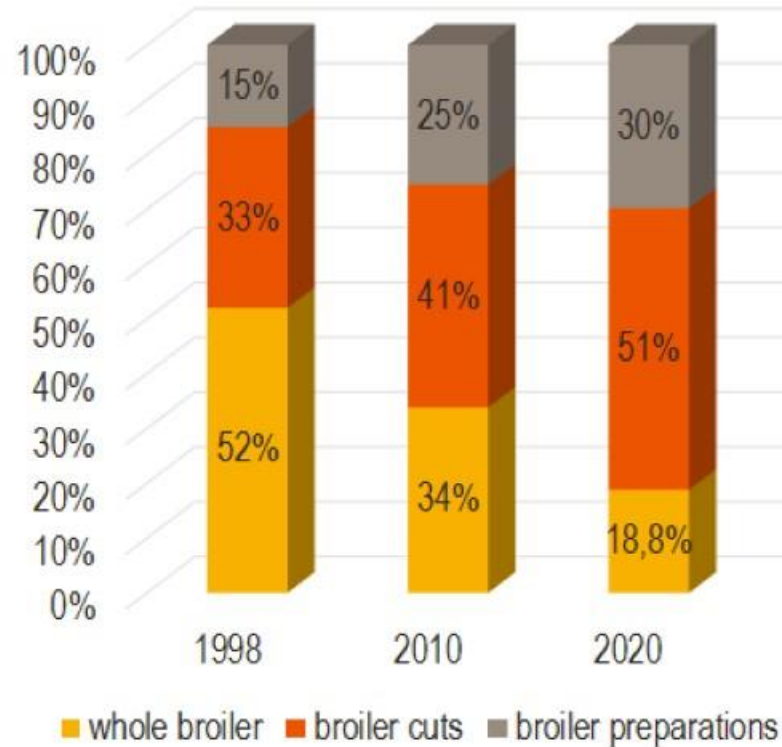
At-Home consumption of broiler by segment

2/3 whole broiler consumption are rural ... broiler breeds not suitable for cut

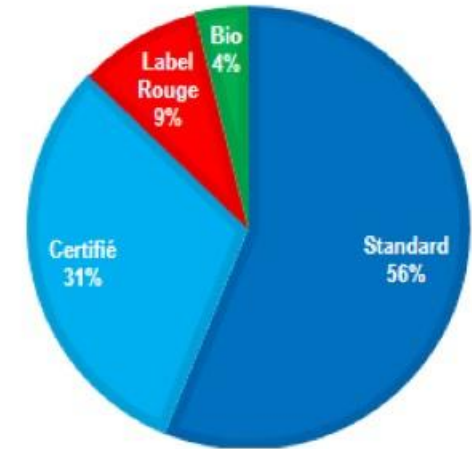
Specific poultry segmentation in France (2020)



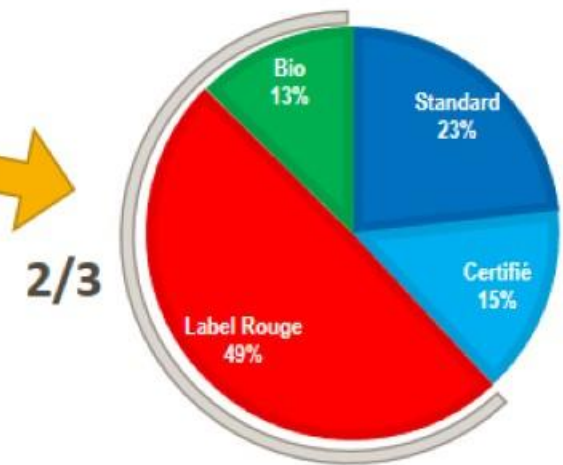
AT-Home consumption of broiler



Broiler cuts consumption by segment

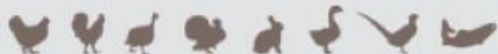


Whole broiler consumption by segment



2/3

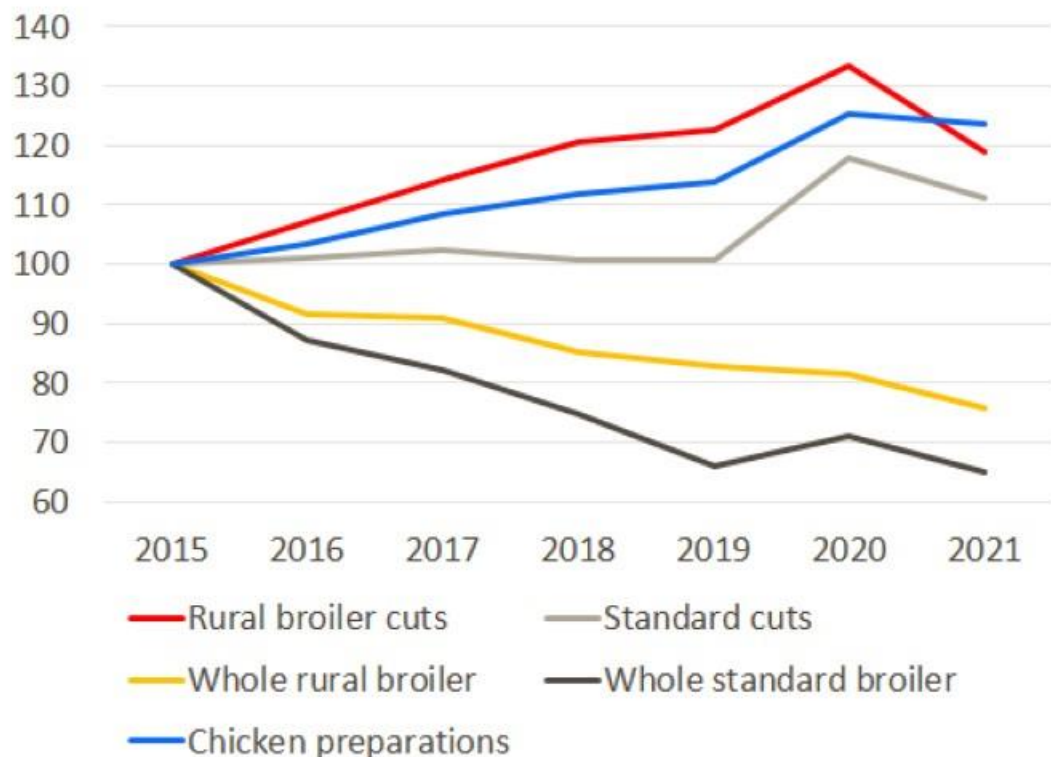
Source : ITAVI, Kantar



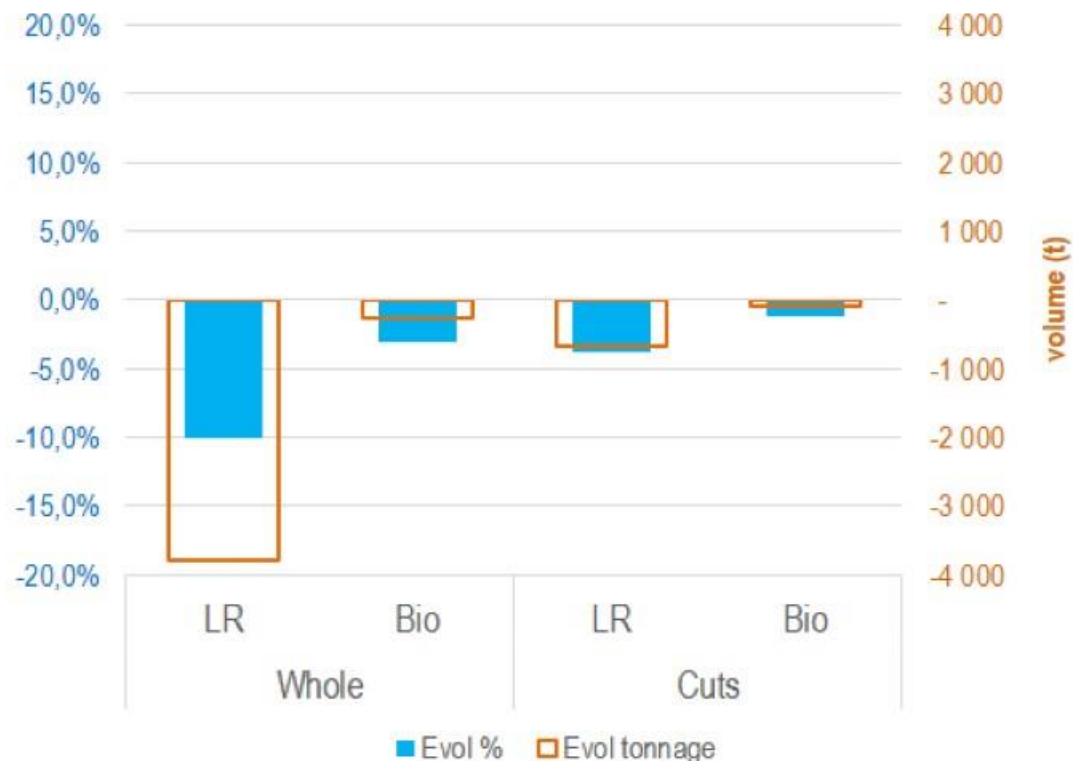
At-Home consumption of broiler by segment

whole broiler → declining demand, rural resists

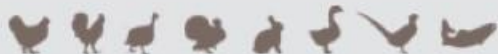
Evolution At-Home consumption (base 100 : 2015)



Evolution Rural broiler consumption by segment (2019 vs 2021)

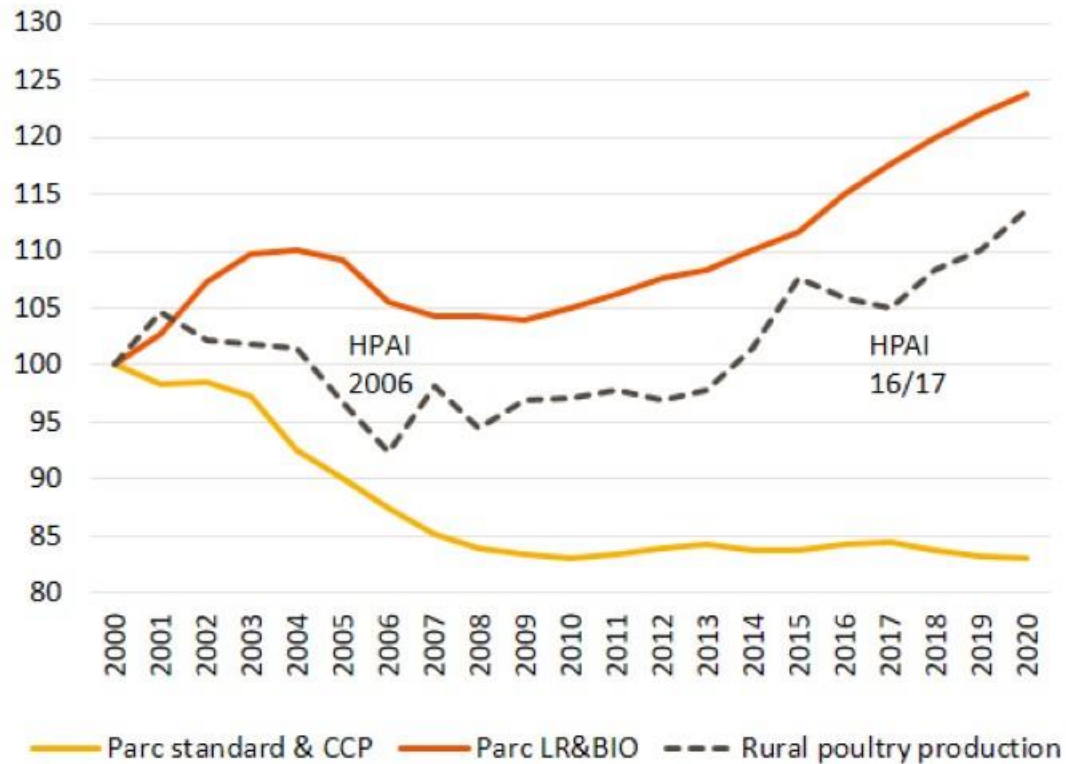


Source : ITAVI, Kantar



Buildings superficies more dynamic in « Label Rouge & organic » (5 millions m² in 2020)

Buildings superficies evolution



Dynamic trend in investment in new livestock buildings

Rural poultry production keeps its attractiveness

+ Farmers have rural poultry production as a complementary activity

+ production LR&Bio (–) market shares vs standard

Source : ITAVI – enquête bâtiment

Specifications that distribute farms installation on the territory

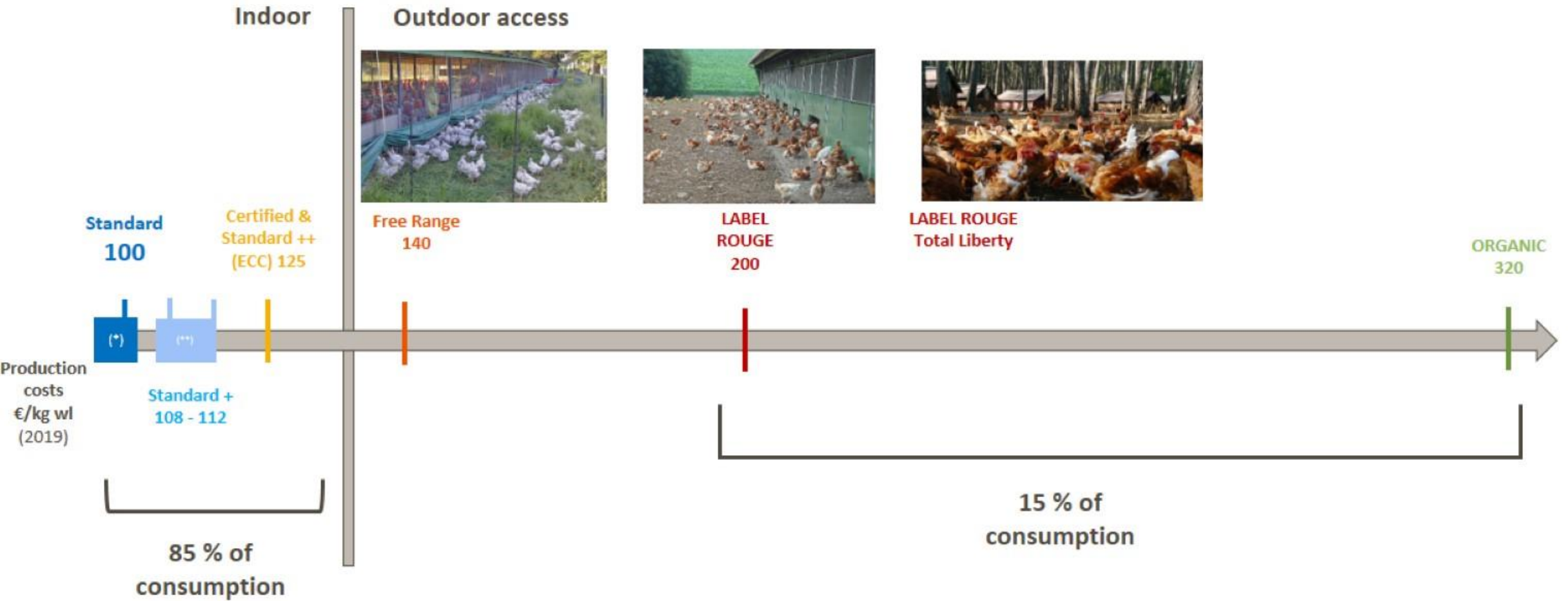
less working time requirement

	Standard&CCP	Label Rouge
% Buildings superficies	58%	42%
Production part	80%	20%
Superficies limit	No limits	400x4 (1600 m ²)
Average surface area per farmer	2 200 m ²	1 050 m ²
Annual work unit (AWU)	1,0 (for 3 000 m ²)	0,75 (for 1 600 m ²)
Outdoor surfaces requirement	-	3,5 ha
Farmers number	4 700	5 200 (LR&Bio)

- Lack of land (outdoors) in the historical basin forces young farmers to settle in other regions
- Less working time and size requirement (0,75 AWU & 1 600m²) per breeding site favour polyculture systems
- The production specification promotes territorial coherence : complementarity with other activities (pork, cattle, crop production...);
- More farmers in LR&Bio for only 20% of production
- Less geographical concentration

Source : ITAVI estimation – enquête bâtiment 2020

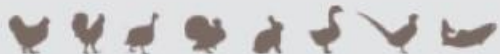
Production cost, indoor/outdoor broiler segmentation in France, 2020



(*) classic strain chicken, supermarkets, industry and export

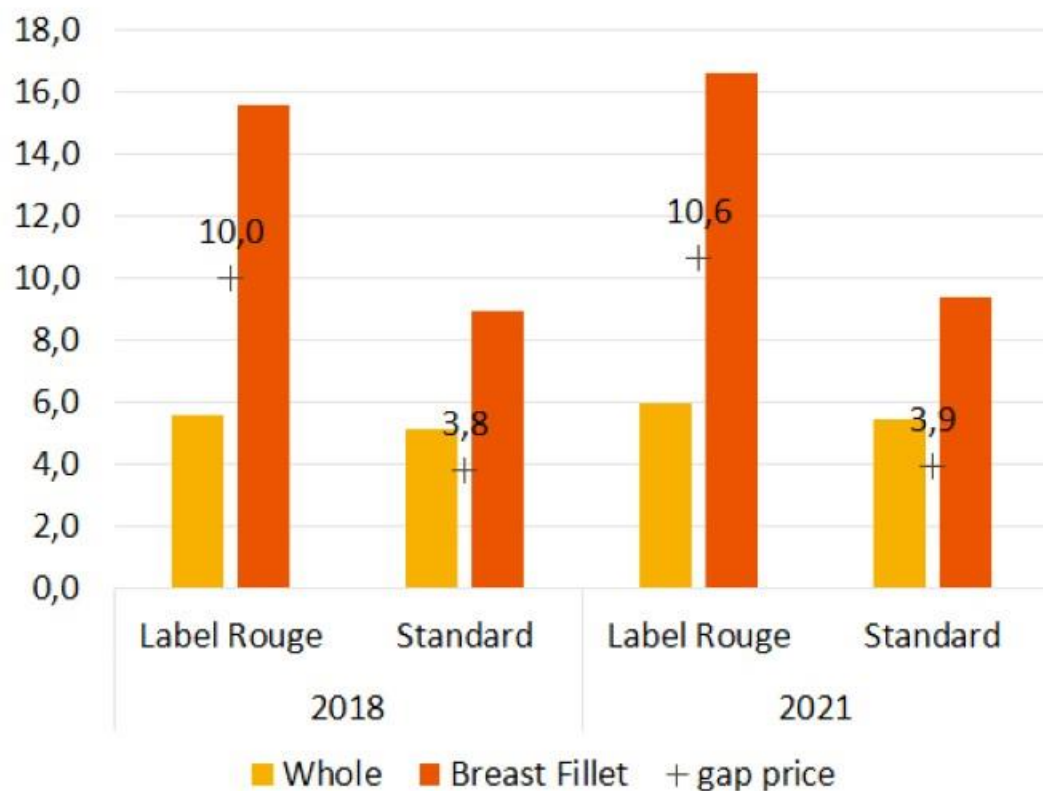
(**) chicken with specifications: supermarkets (ex. Non-GMO), export (strain), industry (pododermatitis)

Source : ITAVI d'après Performances techniques et coûts de production, Enquête avicole CRAB



Challenges of rural poultry in the next years

Consumer price gap in rural and standard broiler meat (€/kg)

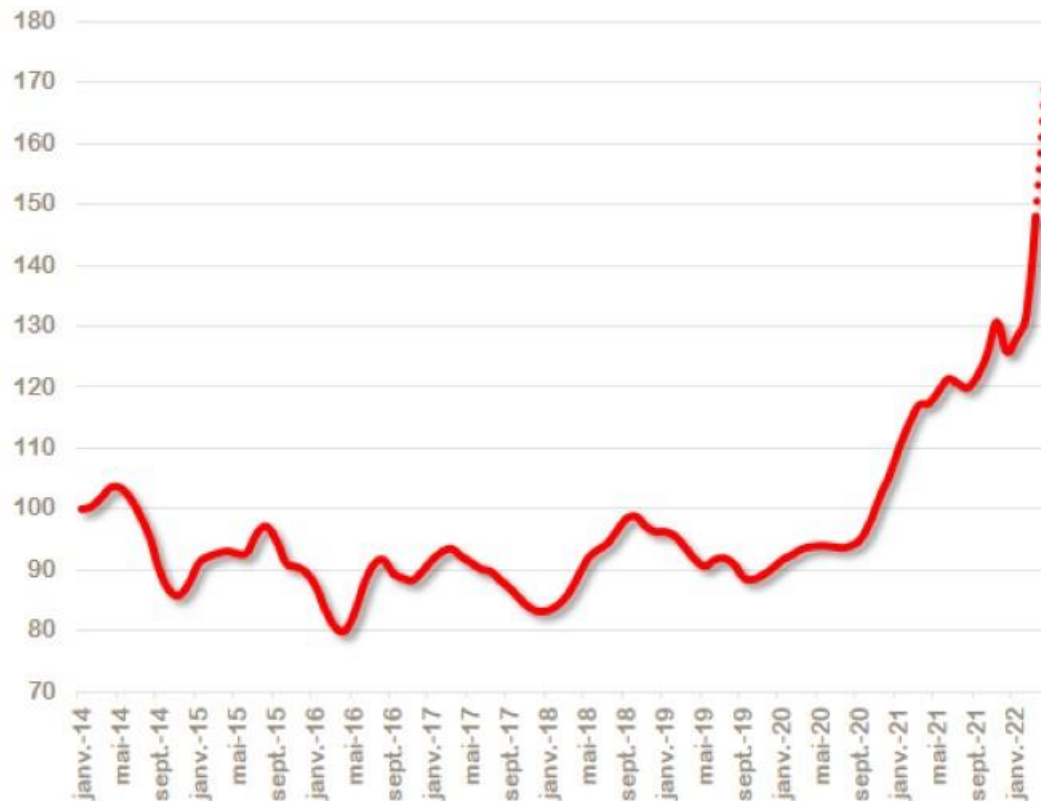


Source : ITAVI

- Rural poultry farming remains attractive
- Develops cohesion between territories and humans. Improves biodiversity (outdoor runs, polyculture...)
- But risk of availability of land for outdoor runs (15 000 ha currently), more demand in the next years with development of free range
- Today's challenge: the gap in technical gains is widening between the standard and rural poultry (more demanding specifications)
- A higher price in LR chicken fillet (low breast yield)... Consumption trend towards fillets and preparations

Challenges of rural poultry in the next years

ITAVI Feed cost index – Label Rouge broiler



Source : ITAVI

- Sharp increase in feed prices (+55%) in 2 years, quid of the Ukrainian crisis:
- Risk of a +35% increase in the coming months
- Risk of shortage of non-GMO raw materials
- High rise in construction costs (wood, plastic, iron, aluminum...)
- HPAI problems in recent years (housing requirement)



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