L'INSTITUT TECHNIQUE DES FILIÈRES AVICOLE, CUNICOLE ET PISCICOLE

State of play on "alternative" meat poultry production in Europe

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EU marketing terms : the legal framework

Production system	**Minimum slaughter age (days)**	**Maximum stocking density indoor**	**Outdoor access**	**Feed**
Extensive indoor (b)	56	15 (& 25 live kilos)	NO	-
Free range (c)	56	13 (& 27.5 live kilos)	YES , 1 m²/ bird	-
Traditional free range (d)	81	12 (& 25 live kilos) If mobile buildings (20 & 40 Live kilos)	YES, 2 m²/bird	> 70 % cereals
Free range- total freedom (e)	81	12	YES No limit	> 70 % cereals
Organic	81 days OR slow growing breed….	10	YES, 4 m²/ bird	95 % Organic + regional supply

Regulations CE/543/2008 & 834/2007

European outlook free range & organic production

UK
5 % of chicken production
35 million birds

Free range 56 days
Organic 70 days

France
16 % of chicken production
120 million birds

Label Rouge (traditional free-range & total freedom free-range): 81 days
Organic : 81 days (<1 %)

Spain
1 à 2 %
< 10 million birds

Poland
??

Pays-Bas
1 million birds
Free range 56 days
Organic

Germany
< 10 million birds
Freiland: 56 days
Organic: 56 - 70 days

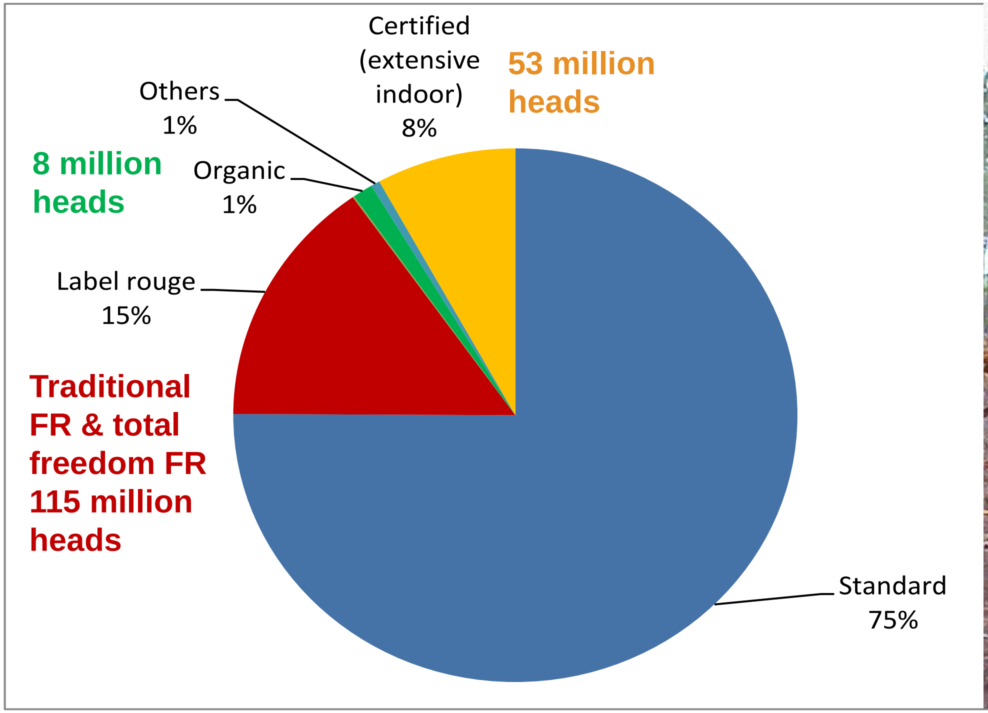
Belgium
1 à 2 million birds
Free range 56days
Organic 70 days

Italy
2-3 million birds

FOCUS ON THE MAIN PRODUCING COUNTRIES

France

Alternative production
25 % of the broiler's controlled slaughtering



- LR : Over 20% of domestic consumption of chicken (25% of home consumption, 60% of whole chicken home consumption)
- A historical place of LR with specific constraints (food, limited size, local production)

United Kingdom

About 20% of "alternative production"

- Indoor Freedom Food (RSPCA) < 3 %
- Welfare retailer brands : 10 - 15 % market share (lower density but no maximum on DWG)
- Free range (56 days) < 4 % of production
- Organic (70 days) = 1%

Freedom Food	Stocking density	Outdoor access	DWG (g)
Indoor	19 p /m² (30 kg /m²)	Non	**45**
Free range (c)	13 p/m² (27.5)	1m²/p	**45**
Organic *Mobile buildings*	10 (21) *16 (30)*	4 m²/p *2.5 m²/p*	

ITAVI from interviews (2013)

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Germany

- *Less than 10 million birds reared with an outdoor access*
  - **Freiland (free range 56 days) < 1%**
  - **Organic (56 to 70 days) < 1%**
- Private welfare labels « Vier Pfoten Sehr Gut », Privathof Geflügel …
- Initiative Tierwohl : a cross-sectoral alliance from agriculture, meat sector and food retail. Enriched environment & increased space allowances

ITAVI from interviews (2013) and Christ 2015

The Netherlands

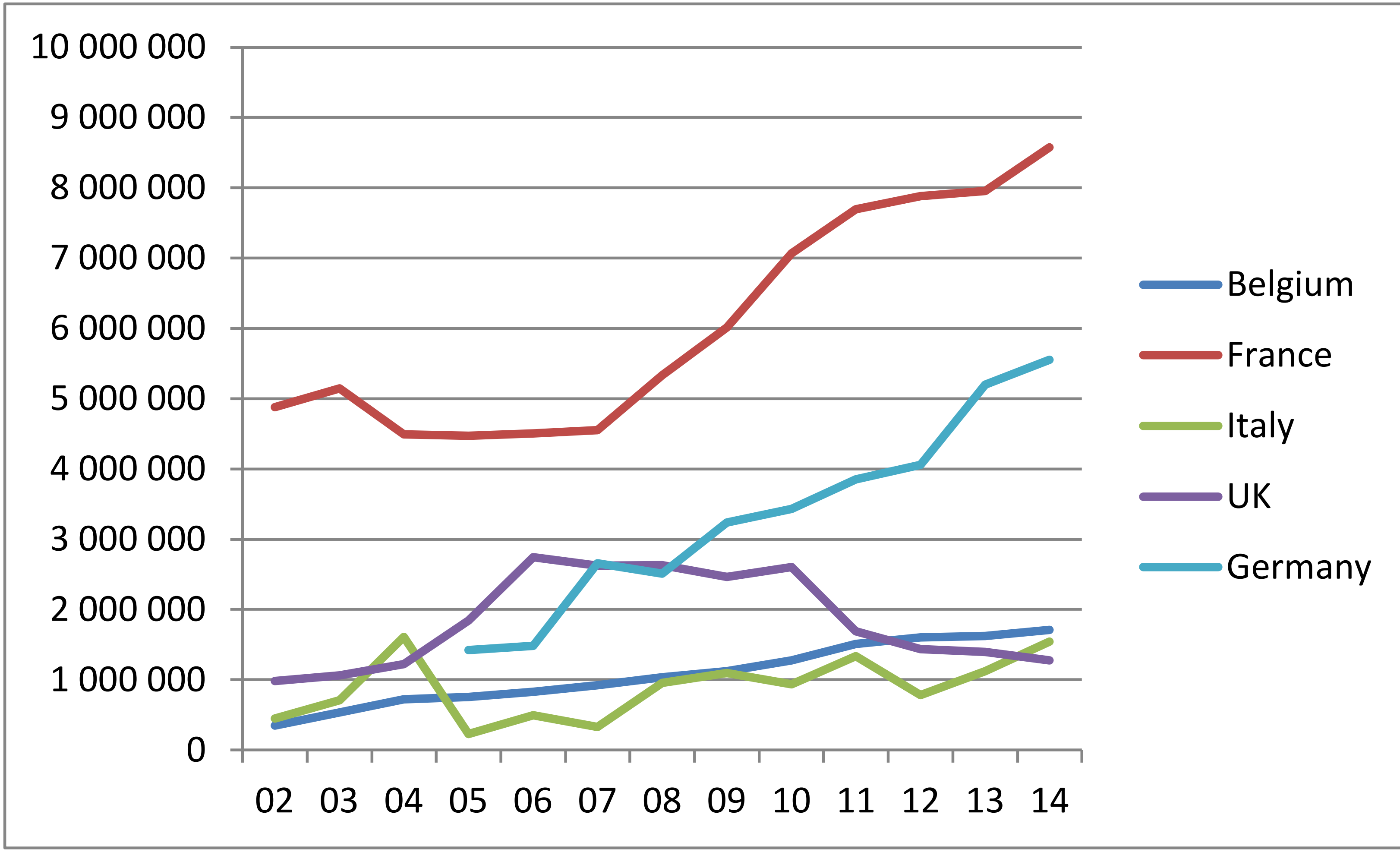
Export oriented production (self sufficiency level 300 %)
Low share of production with an outdoor access < 2%
Welfare approaches "Kip Van Morgen" initiated by NGOs and retailers beyond farming practices (certified soy, slaughter and transport)

	Slaughter Age (days)	Stocking density	Outdoor access	Share of the production
« Kip Van Morgen »	45- 50	25 (Lidl) to 38 kg/m² enriched environment soya RTRS	NO	Rapidly increasing Goal 100 % fresh domestic market (1/3 prod.) 34% Ahold, 10% Lidl
Beterleven * (scharrel kip) (extensive indoor) (b)	56	25 kg/m²	NO Winter garden	3 % of production (8 % of domestic market)
Beterleven ** Free-range (c)	56	27.5 kg/m²	YES	< 1% (2 % of domestic market)
Beterleven*** Organic & traditional FR (d & e)			YES	< 1 % (2 % of domestic market)

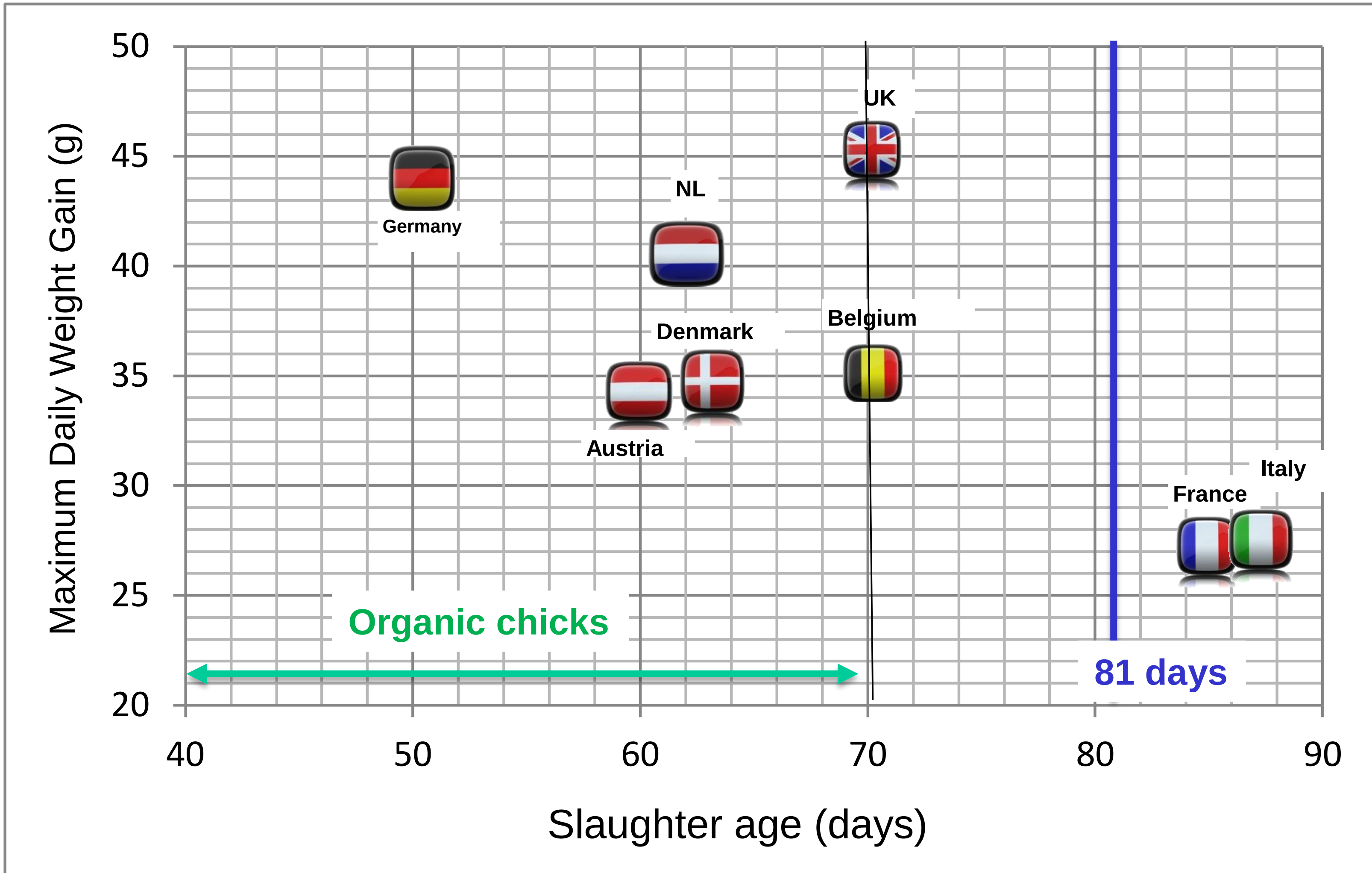
ITAVI from interviews (2013) and Van Horne (2015)

FOCUS ON THE ORGANIC PRODUCTION

EU chicken organic production dynamics



Organic production : a great heterogeneity of practices within the EU



Itavi from different national sources

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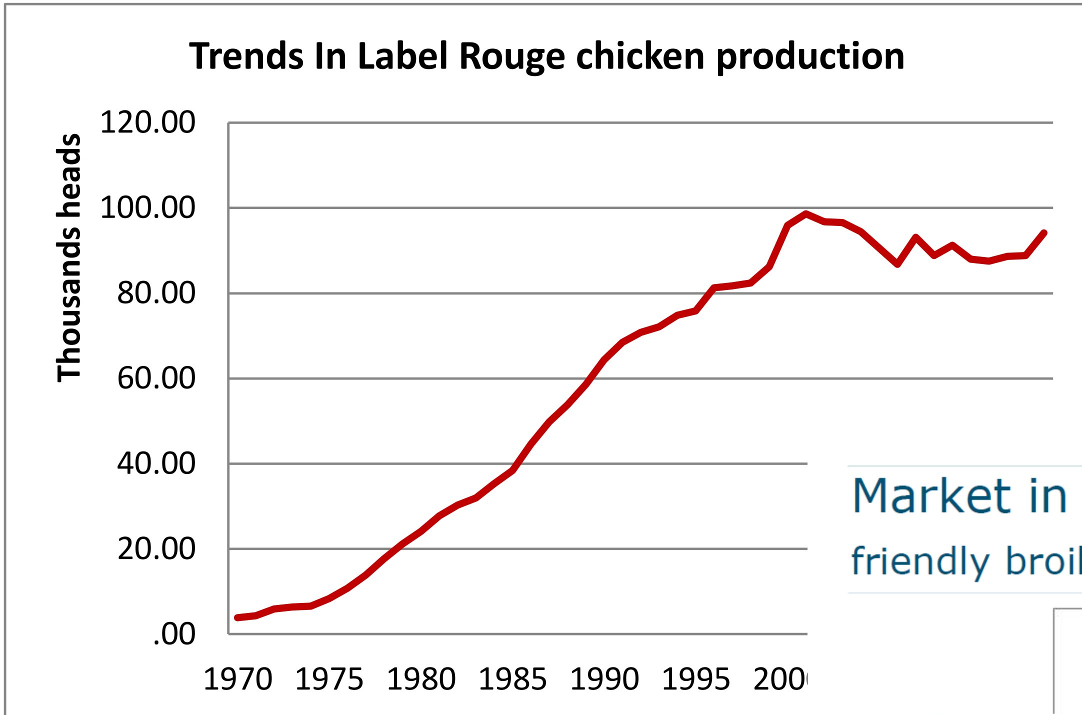
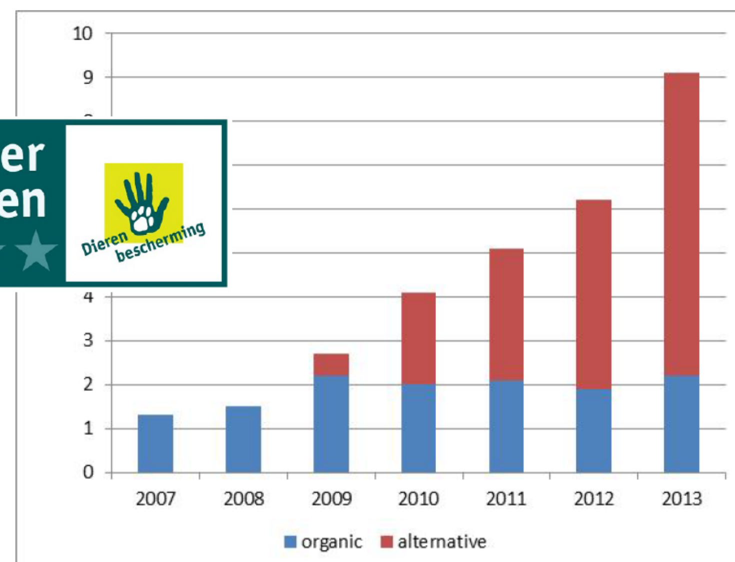
CONCLUSIONS

« Alternative » production Dynamics

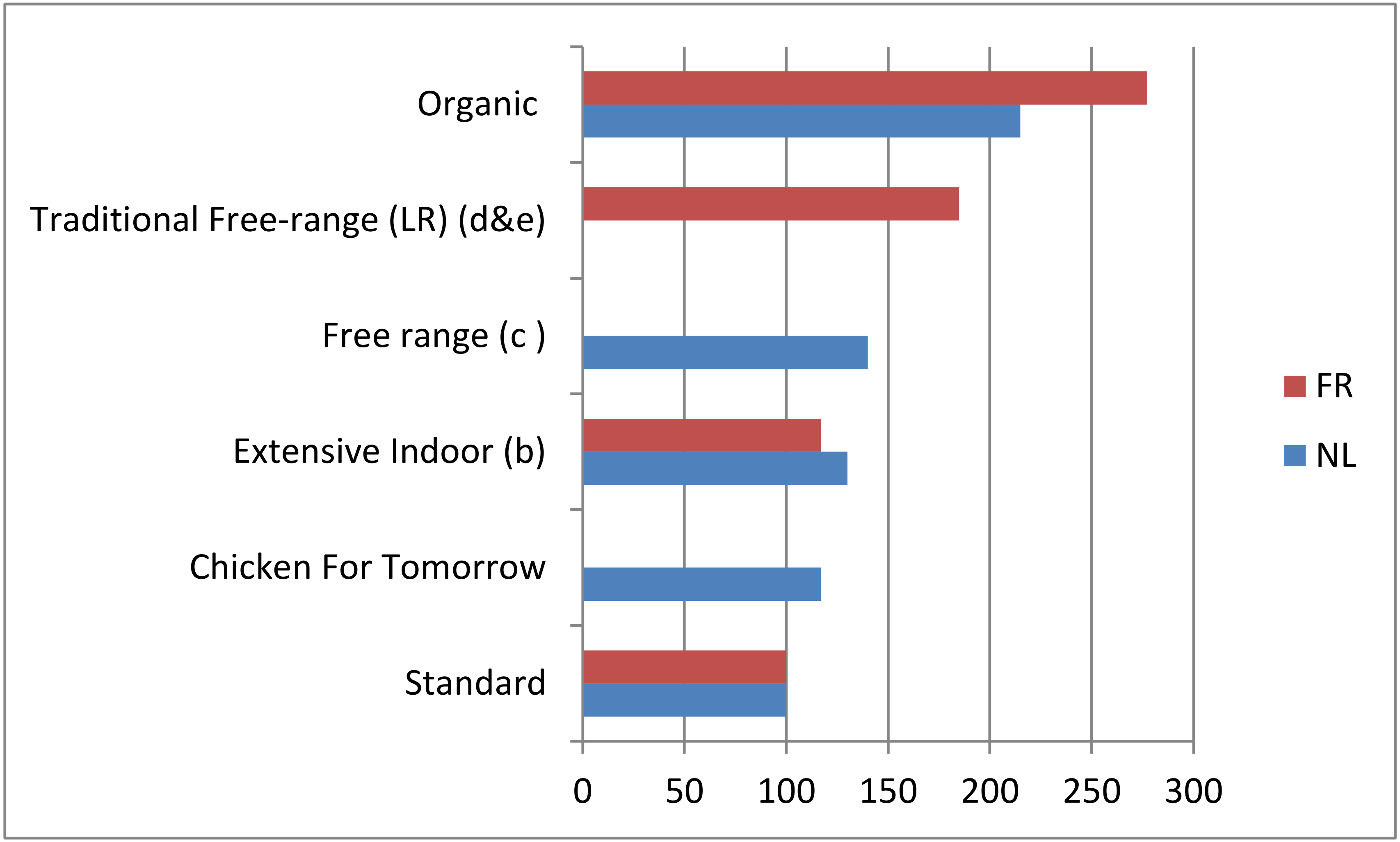


Market in NL: household purchases of 'animal friendly broilermeat' in % of total sales



2014: almost all retailers sell BL* broilermeat
Source: MDV, 2014

Great gaps in production costs



Key points on alternative production in Europe

- Alternative production: a blurred perimeter
  - A small part of chicken production with an outdoor access : 2 to 4% in most countries, 5% in the UK, 16% in France…
  - A production development "indoor +" with low densities and environmental enrichment in Northern EU
  - Data only available for organic production
    - But a lot of countries data are missing
  - No data for extensive indoor & free range productions
  - No data on commercial channels for these alternative productions
- A need for a better monitoring of the supply and demand of “alternative products”

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Thank you for your attention

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