

The image features three white feathers of varying sizes and orientations scattered across a black and white checkered pattern. The pattern is a classic houndstooth or checkerboard design. The feathers are positioned in the upper left, upper right, and lower left areas of the frame. The central text is set against a solid black background.

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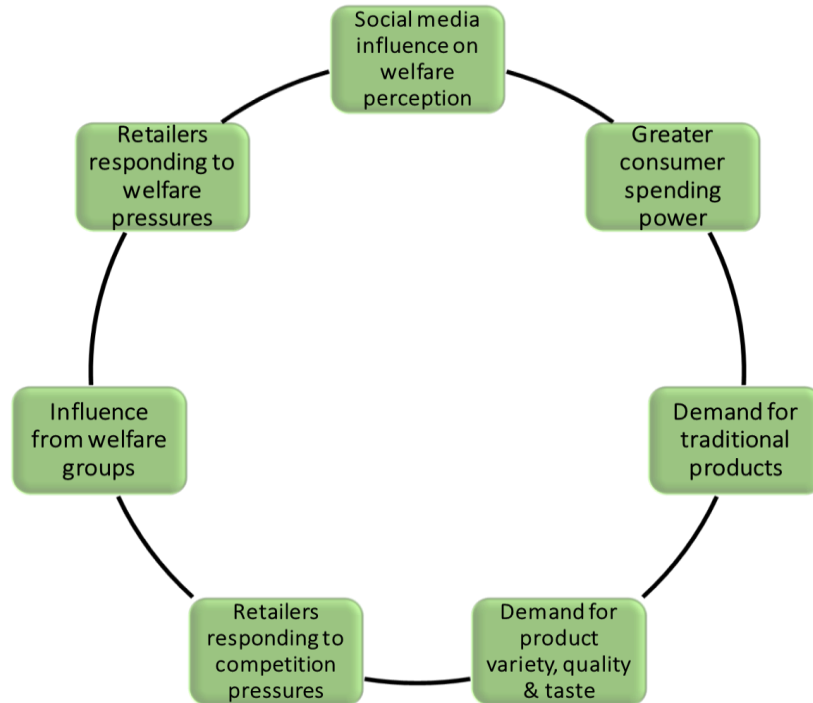
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EDITION

# Slower growing poultry

## Economic and environmental impact



# Market influencers



# Market Developments - Europe

- Approx 7% of all EU Parent Stock are for slower-growing production (source EFSA)
- Large country-by-country variation
- Market more sensitive to economic climate than conventional products
- A range of accreditation schemes
  - Certifié, Label Rouge (France)
  - Beter Leven, Kip van Morgen (NL)
  - Privathof, Deutscher Tierschutzbund (Germany)
  - RSPCA Assured (UK)



# Market Developments – US

## The race to 2024

Global Animal Partnership (GAP) was founded with assistance from Whole Foods Market and has farm standards for broiler chickens, pigs, beef cattle and turkeys

Major retailers, food service companies and Quick Service Restaurants (QSRs) announce transition to slower-growing chicken





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# **Slow Growing Bird Differentials**

# Rowan Range Performance - US

Product	Age	Weight (Kg0)	ADG (lb/d)	FCR adj.*	Livability %	Evis. %	Breast %	lb Feed/ lb Carcass	lb Feed/ lb Breast
Ross 308	38.5	2.5	63-67	1.62	96.5	73.4	22.7	100%	100%
Ross 708	39.7	2.5	61-65	1.63	97.0	74.3	24.2	99%	94%
Yield Plus x Ross 708	40.3	2.5	60-64	1.63	97.0	74.8	25.0	99%	91%
Rowan 708	47.2	2.5	51-55	1.79	97.5	73.2	23.2	111%	108%
Ranger Premium	51.0	2.5	48-52	1.83	97.5	72.7	21.6	114%	119%
Ranger Classic	50.0	2.5	47-51	1.83	97.5	72.2	20.8	115%	123%
Ranger Gold	55.6	2.5	43-47	1.90	97.8	71.4	19.8	121%	134%
Rowan Ranger	62.5	2.5	38-42	1.99	98.0	70.7	18.7	128%	149%
*Adjusted to 5.5 lbs									



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## **Economics**

**What does the environmental foot print and cost look like?**



# Assumptions

**We assume that no one wants to lose sales through the process, therefore we have to produce an equivalent amount of meat no matter which birds are grown.**

**To make math easy, we assumed a complex processing 1,000,000 birds per week at 5.5 lbs (2.5 kg):**

- Conventional Baseline
  - Yield Plus x Ross 708
- Slow Growing Options
  - Rowan 708
  - Ranger Premium





# Annual Production Volumes (kgs)

## 1,000,000 birds per week would produce:

- Yield Plus x Ross 708 = 32 043,000 kgs of white meat
- Rowan 708 = 28,021,000 kgs of white meat (12.5% less meat)
- Ranger Premium = 28,800,000 kgs of meat (10.1% less meat)

# Additional Broiler Impact (kgs)

Therefore, to equal the same volume of production a complex would have to place extra broilers for the slow growing breeds:

- Rowan 708 = 7,462,963 broilers per year extra
- Ranger Premium = 5,855,856 broilers per year extra



Given the average broiler house is 25,000 broilers, a complex would need extra broiler housing (Capital Cost):

- Rowan 708 = 48 houses @ \$400,000/house to build = \$19,192,423
- Ranger Premium = 39 houses @ \$400,000/house to build = \$15,796,619



You also need to feed those broilers:

- Rowan 708 = 34,181,616 kgs of additional broiler feed
  - Additional Feed Costs = \$8,666,031
- Ranger Premium = 27,420,144 kgs of broiler feed
  - Additional Feed Costs = \$6,951,802



# Additional Breeder Impact (kgs)

To produce extra broilers, a complex would need to have extra breeders:

- Rowan 708 = 57,189 breeders per year extra
- Ranger Premium = 41,332 breeders per year extra



Given the average breeder house is 8,000 breeders, a complex would need extra breeder housing (Capital Cost):

- Rowan 708 = 7.2 houses @ \$250,000/house to build = \$1,800,000
- Ranger Premium = 5.2 house @ \$250,000/house to build = \$1,300,000



You also need to feed those breeders:

- Rowan 708 = 2,329,489 kgs of additional breeder feed
  - Additional Feed Costs = \$523,830
- Ranger Premium = 1,683,588 kgs of breeder feed
  - Additional Feed Costs = \$378,587



# Additional Pullet Impact (kgs)

To have extra breeders, a complex would need to have extra pullets:

- Rowan 708 = 60,969 pullets per year extra
- Ranger Premium = 44,064 pullets per year extra



Given the average pullet house is 8,400 pullets, a complex would need extra breeder housing (Capital Cost):

- Rowan 708 = 7.3 houses @ \$200,000/house to build = \$1,460,000
- Ranger Premium = 5.3 house @ \$200,000/house to build = \$1,060,000



You also need to feed those pullets:

- Rowan 708 = 802,286 kgs of additional breeder feed
  - Additional Feed Costs = \$173,335
- Ranger Premium = 579,835 kgs of breeder feed
  - Additional Feed Costs = \$125,274



# Additional Impacts

## Additional Land to Produce Feed (all generations)

- Rowan 708 = 29,485 acres (11,937 hectares)
- Ranger Premium = 27,201 acres (11,013 hectares)



# Additional Impacts

## Additional Water (all generations)

- Rowan 708 = 27,649,141 gallons (104,790,246 liters)
- Ranger Premium = 25,400,627 gallons (96,268,377 liters)





# statistics

Product	Feed (M Tons)	Water (liters)	Land (Has)	Houses
Yield Plus x Ross 708	237,531	432,295,479	48,999	391
Rowan 708	295,398	537,085,725	60,936	495
Ranger Premium	290,916	528,563,857	60,012	491



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**Slower growing impact**

Thank you

