

EVOLUTION DES DÉFIS DES PRODUCTIONS AVICOLES DANS LE CADRE D'UNE ÉCONOMIE EUROPÉENNE ET MONDIALE BOULEVERSEE

Journée d'étude des productions porcines et avicoles
Moulins de Beez, 25 novembre 2015

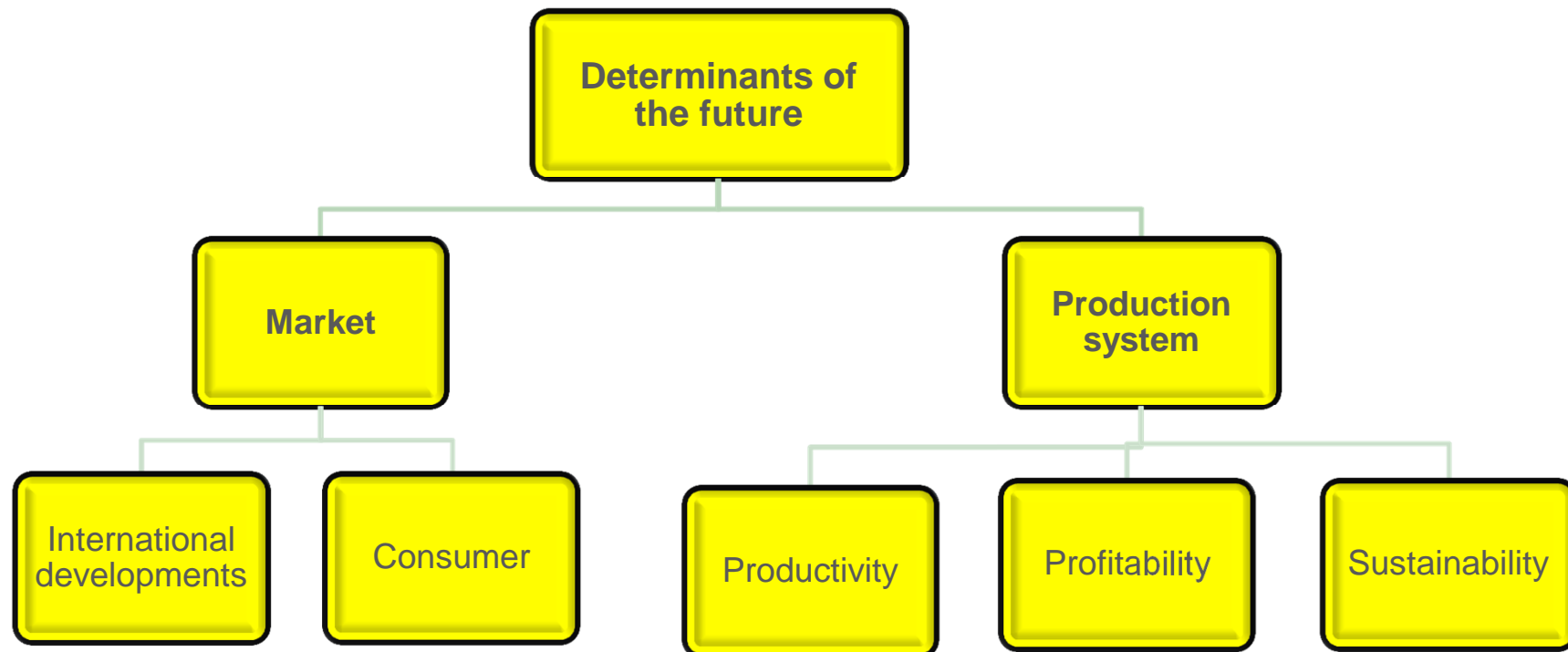


Prof. Dr. Xavier Gellynck & MSc. Evelien Lambrecht
Ghent University, Div. Agri-Food Marketing and Chain Management

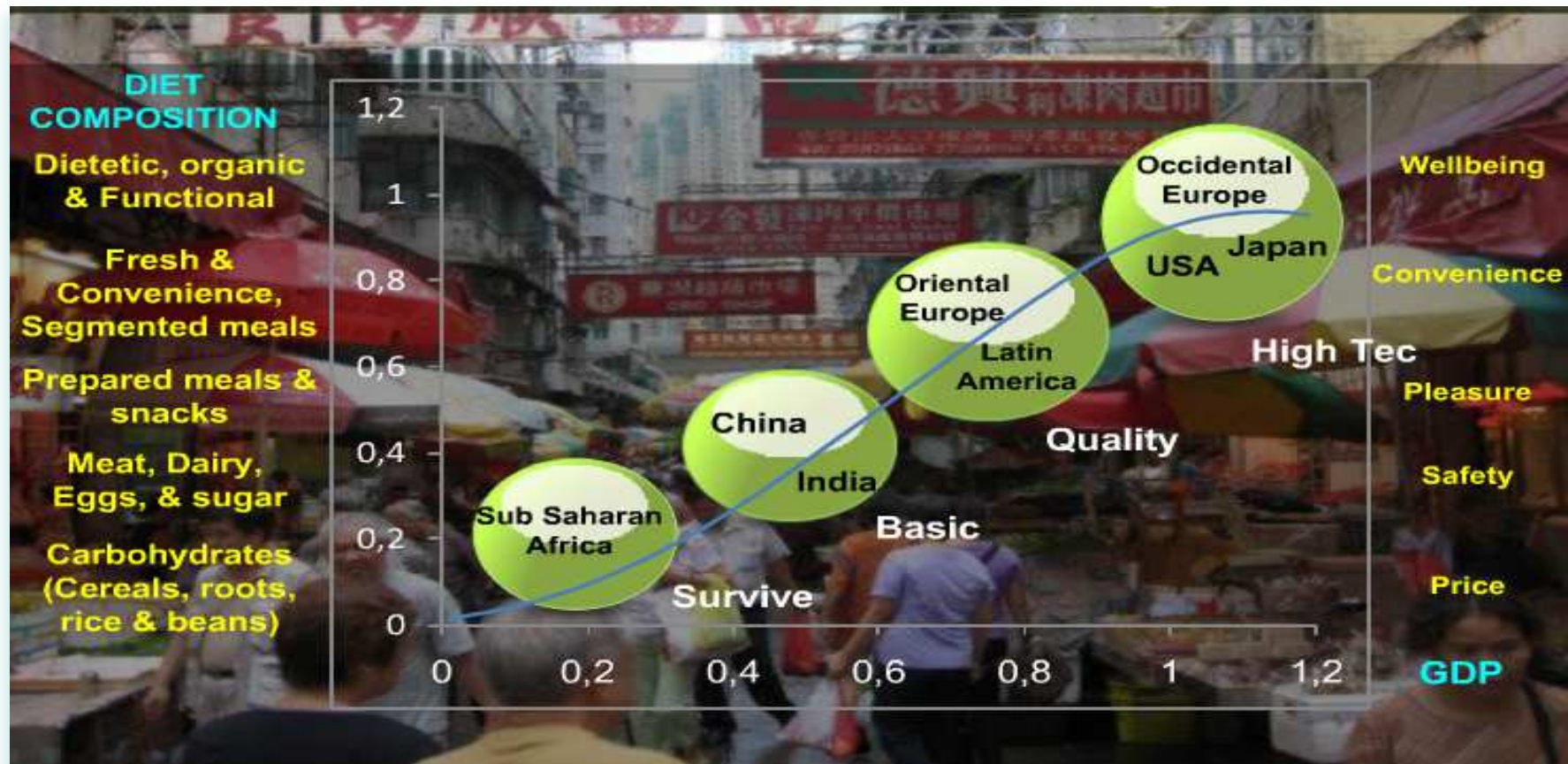
CONTENT

1. Challenges for poultry production
2. Previous business model
3. Current expectations and bottlenecks
4. Conclusions

1. CHALLENGES FOR POULTRY PRODUCTION

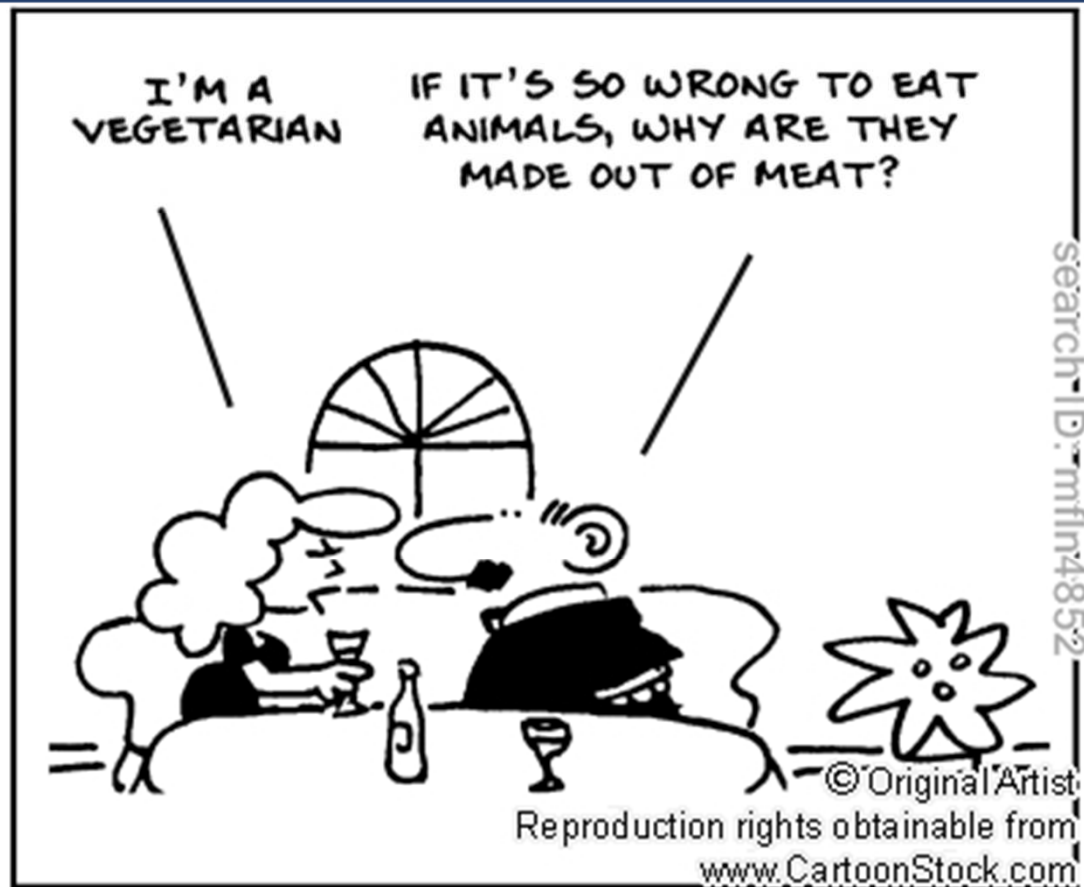


1. Challenges: Changing food habits

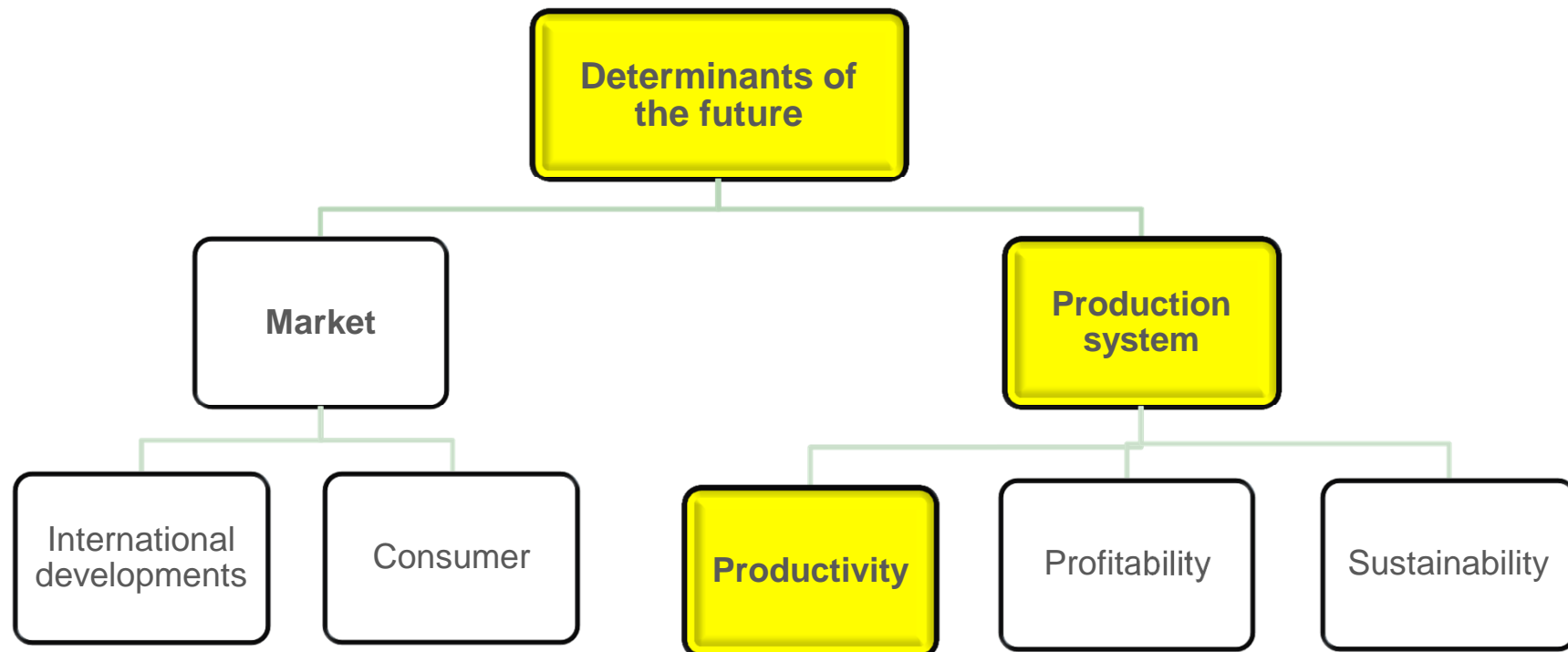


Source: Roppa, 2010

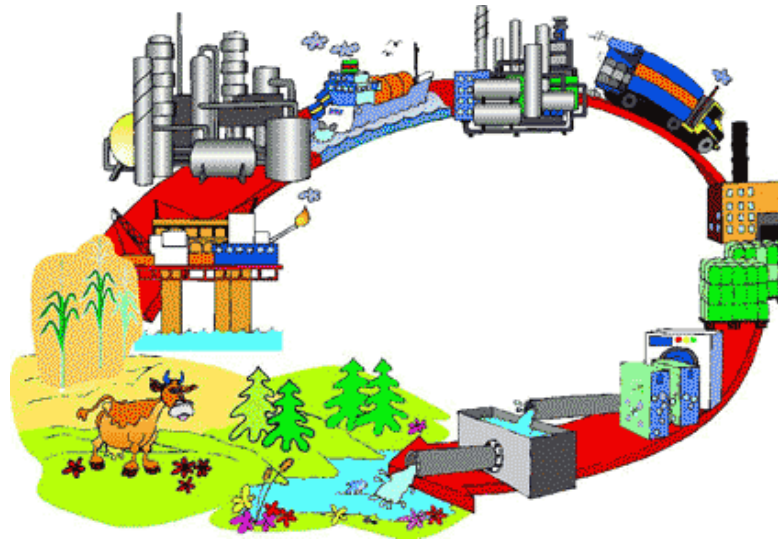
Changing of food habits



1. CHALLENGES FOR POULTRY PRODUCTION



PRODUCTIVITY CHALLENGE

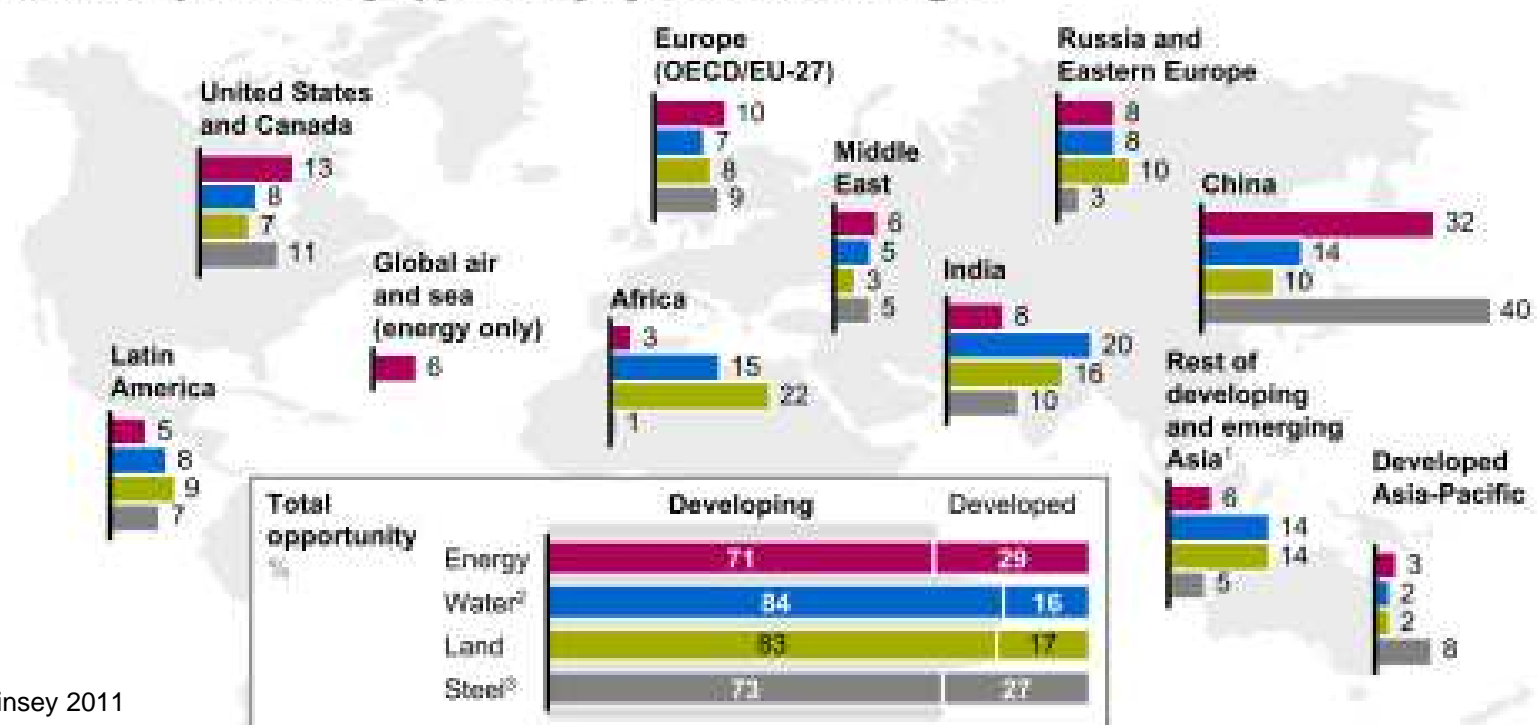


- Can productivity follow demand with scarce resources ?
 - Scarce resources: land, water, labor, energy
- Moderate ⬆ in coming years

Productivity opportunities

Developing countries account for 70 to 85 percent of productivity opportunities

% of total productivity opportunity by resource and region



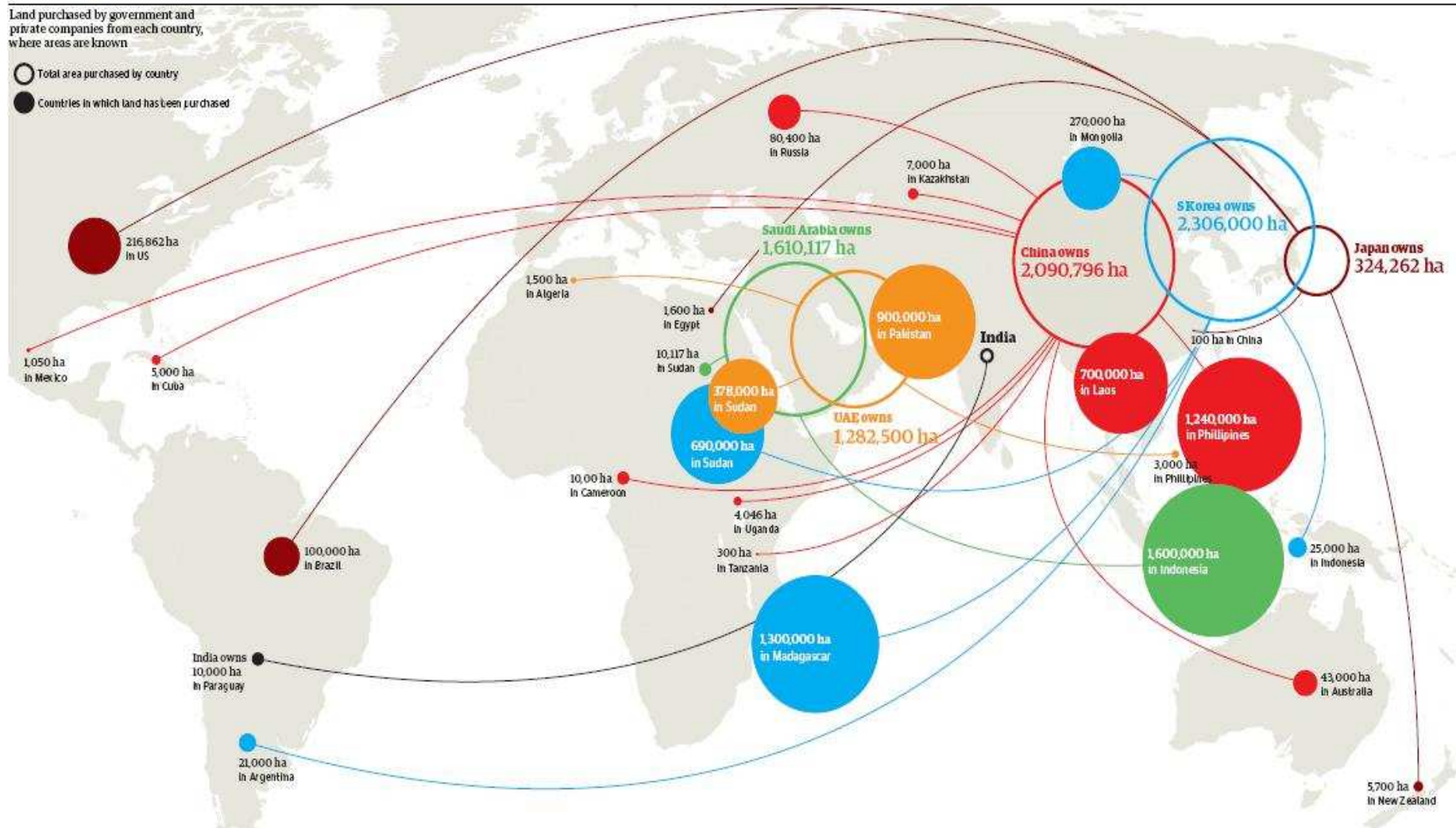
Source: McKinsey 2011

Battle for land

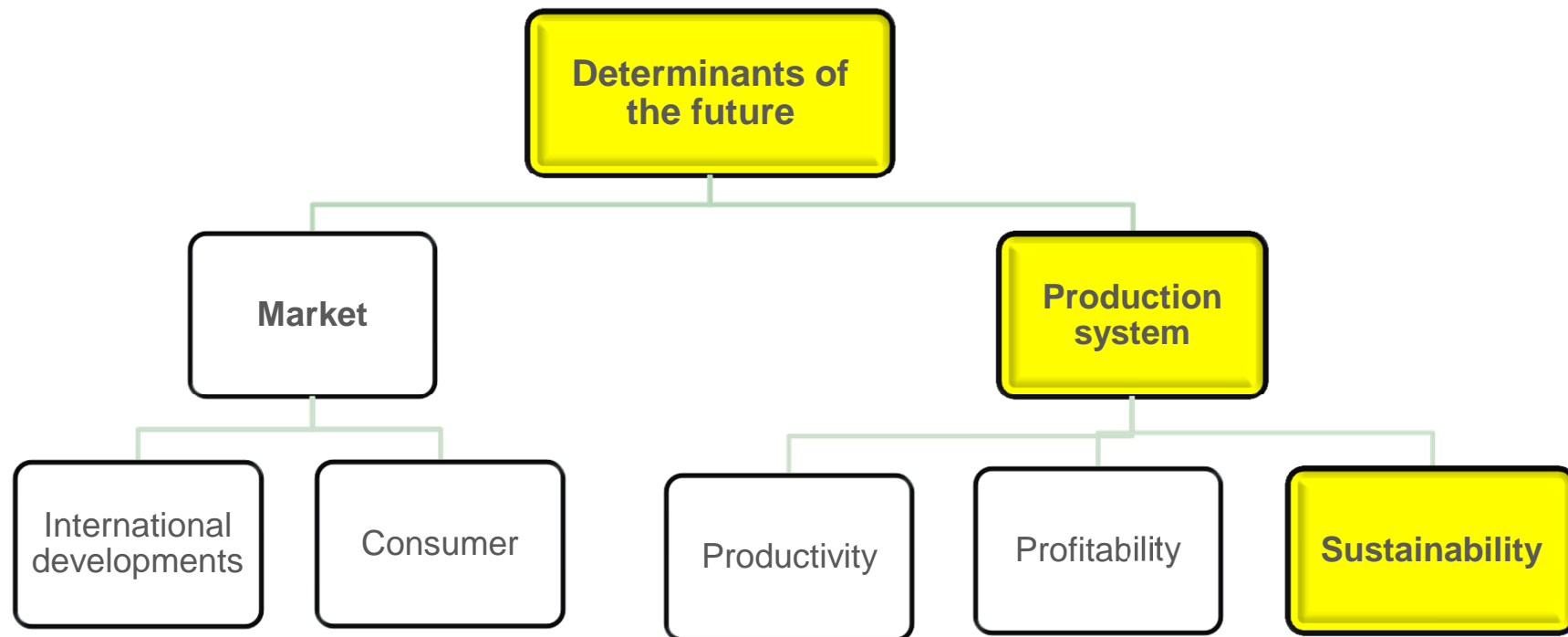
World land grab

Land purchased by government and private companies from each country, where areas are known

- Total area purchased by country
- Countries in which land has been purchased



1. CHALLENGES FOR POULTRY PRODUCTION



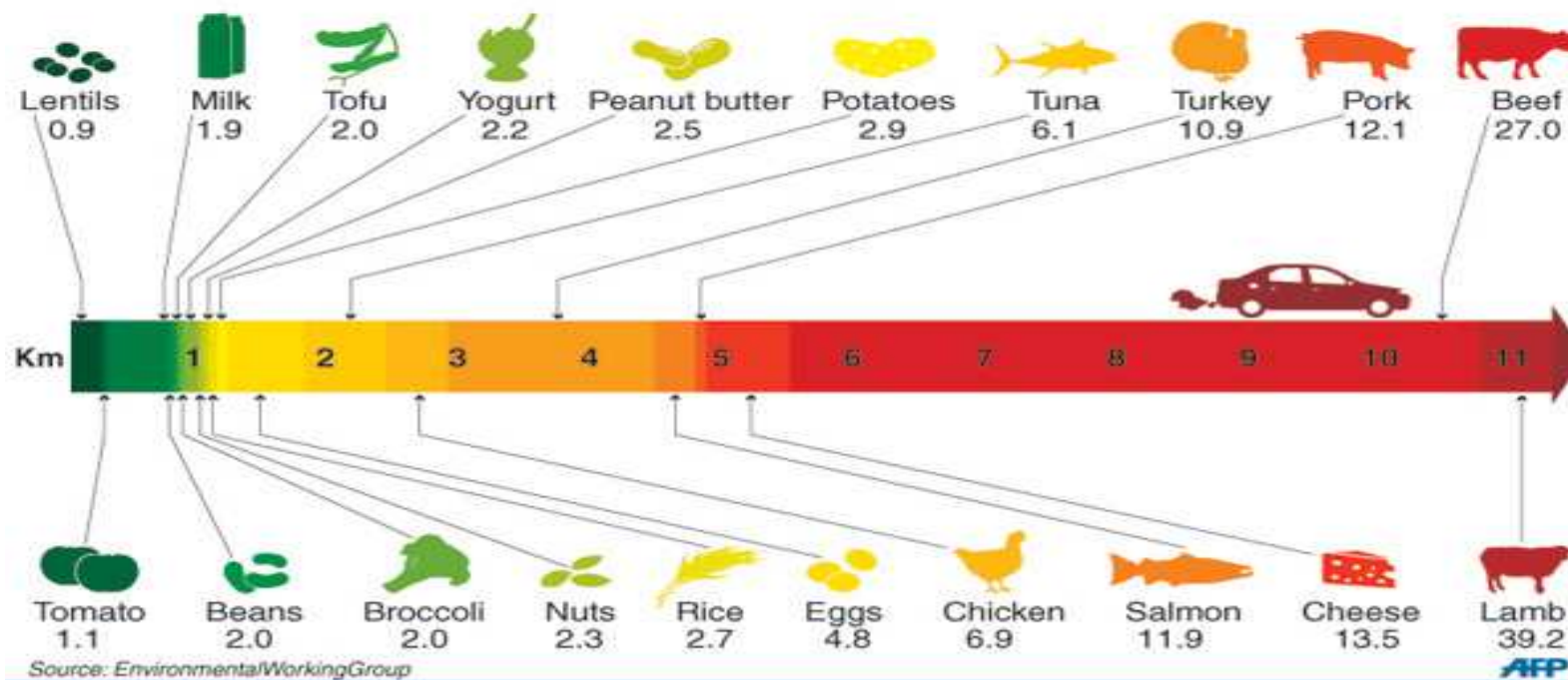
Carbon footprint

Carbon footprint of what you eat

Calculations of greenhouse gas emissions from the production, processing and transportation of specific food items

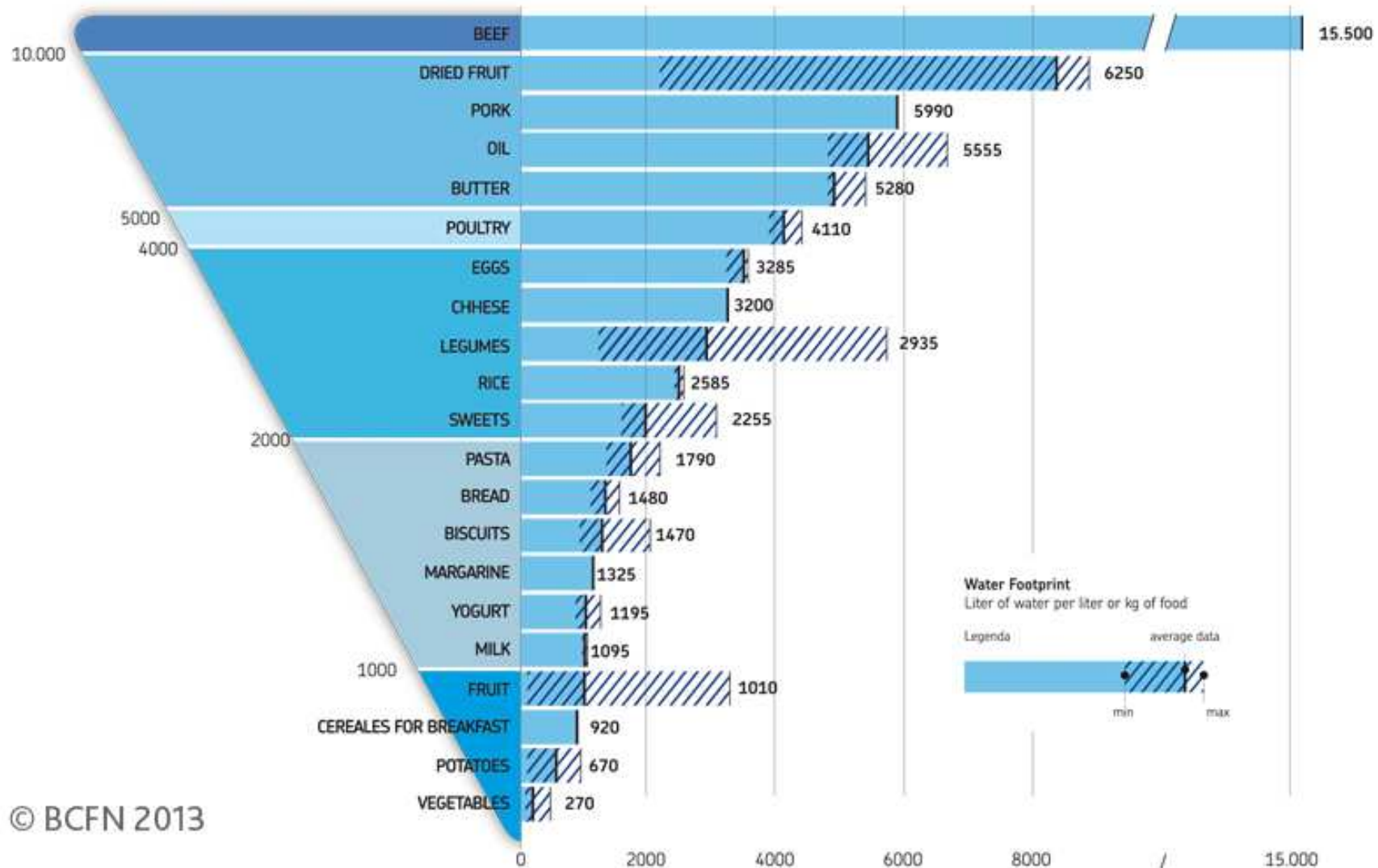
■ Main chart compares 110g of food against a journey in a mid-sized car

■ Number shows kg of carbon dioxide equivalent produced per 1kg of food

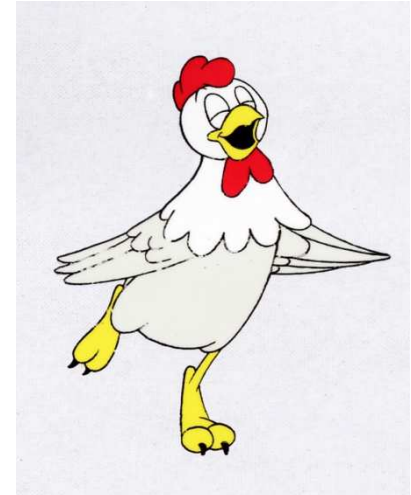


Source: <http://dawn.com/2011/07/25/how-to-eat-well-and-save-the-planet-too/>; 2011

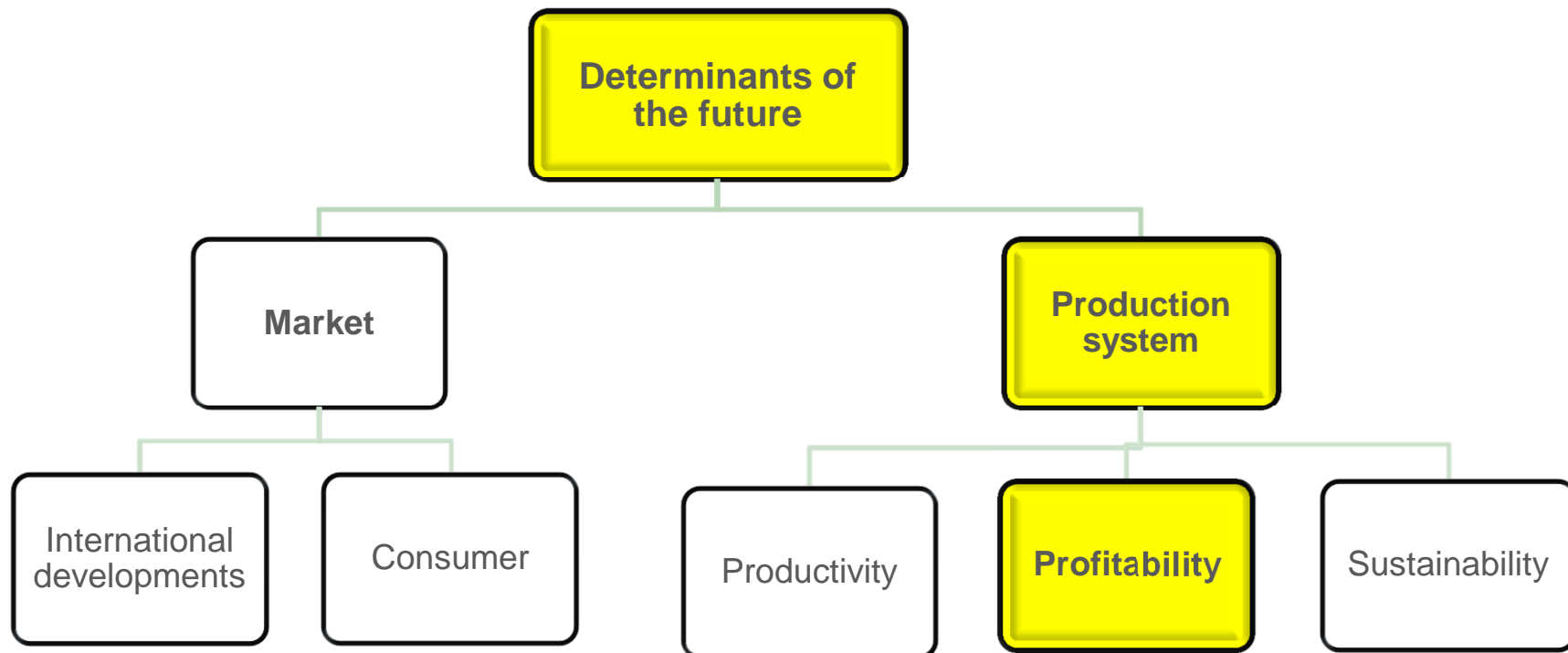
Water footprint food production



Animal welfare



1. CHALLENGES FOR POULTRY PRODUCTION



PROFITABILITY

- Return on investment
 - Farm: 10-15 year
 - Other links: 1-5 year
- Fixed costs ⬆
- Risk ⬆: premium???

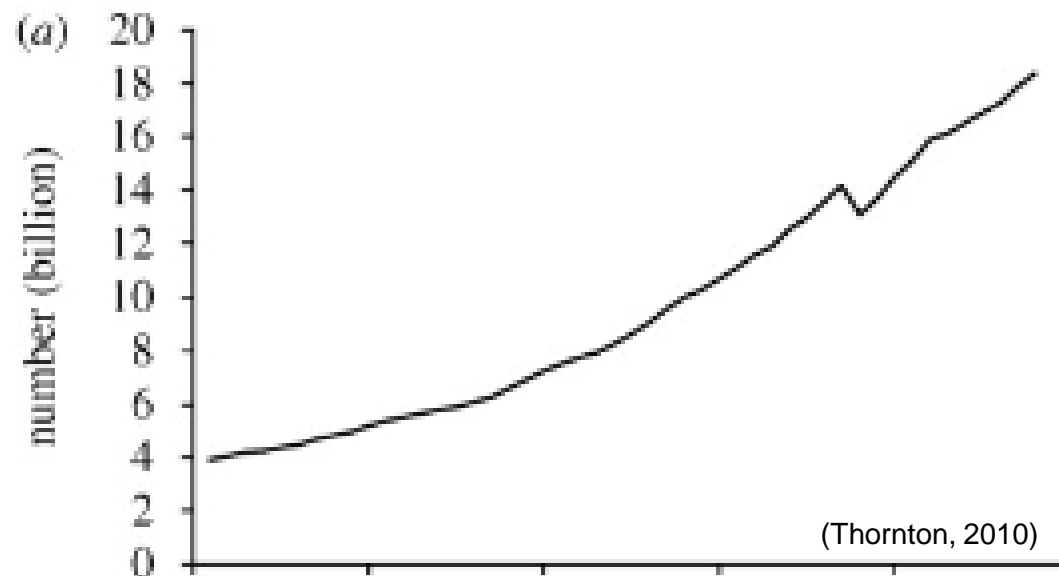


- Does the current business model still fit?
- Future: upscaling (bulk)– downscaling (niche)?

2. PREVIOUS BUSINESS MODEL

- **Production** ↑ ↑

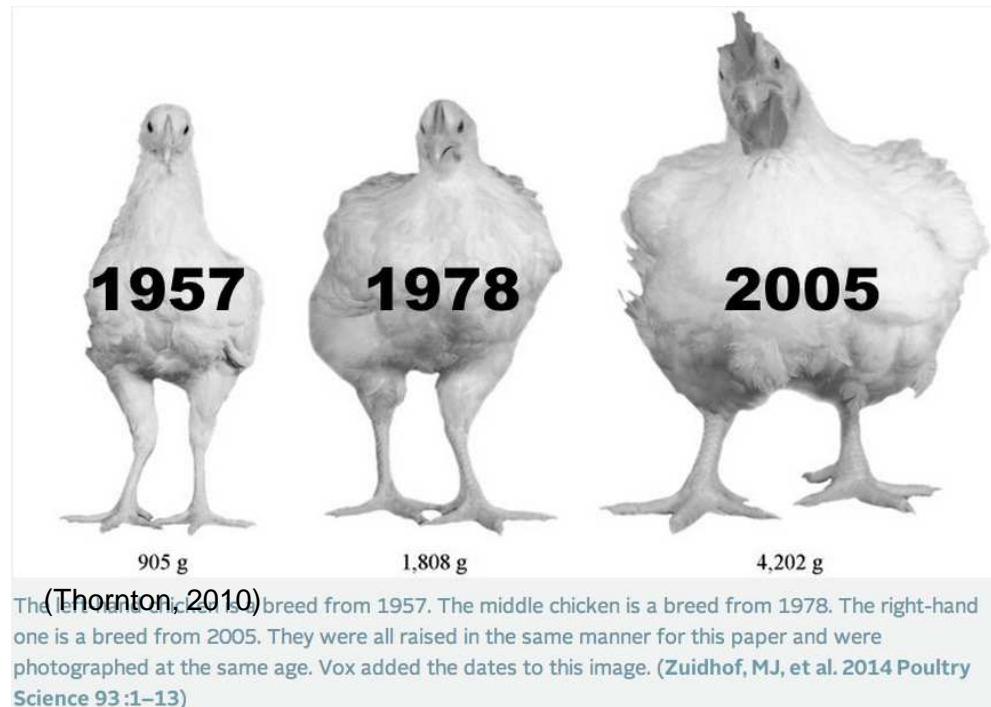
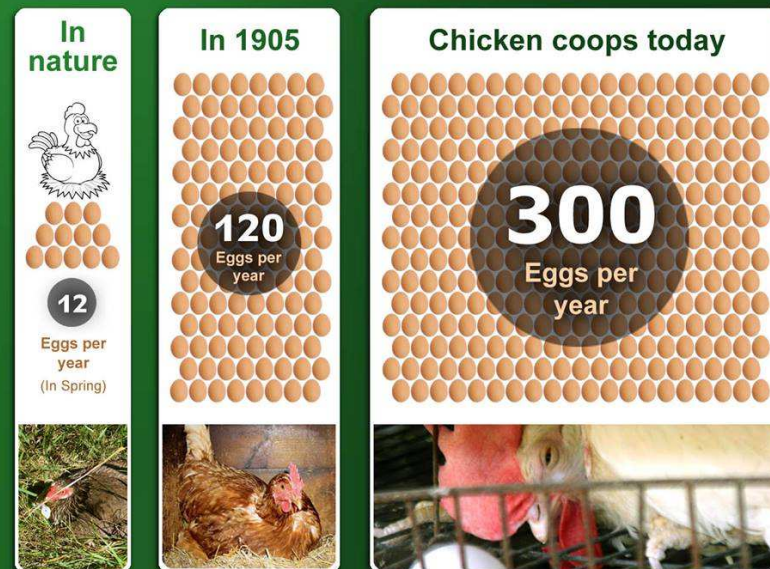
Global evolution 1960 – 2010:
Number of chickens



2. PREVIOUS BUSINESS MODEL

- Production ↑ ↑
- Productivity/ Efficiency ↑ ↑

How many eggs does a hen lay?



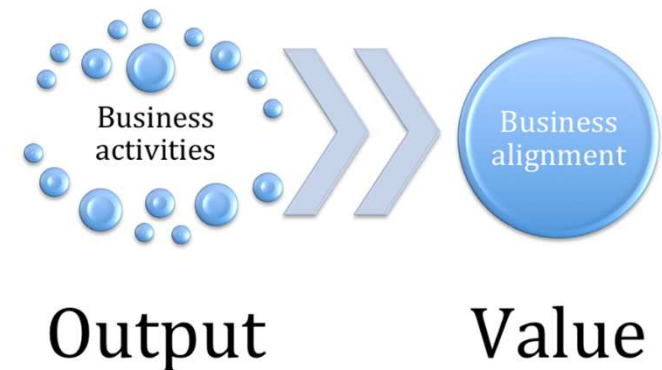
3. CURRENT EXPECTATIONS AND BOTTLENECKS

- Changing tack:
 - **MARKET ORIENTED PRODUCTION** ↑ ↑
 - Add value to products
- Belgium?
 - Example: poultry meat

Chicken (2014)	Export to			
€/100kg	GE	FR	NL	UK
BE	138	210	174	207
GE		278	207	204
FR	308		N.A.	272
NL	293	195		245

3. CURRENT EXPECTATIONS AND BOTTLENECKS

- ~~Undergo~~ - undertake
- Business driven by calamities (Poetin, diseases)



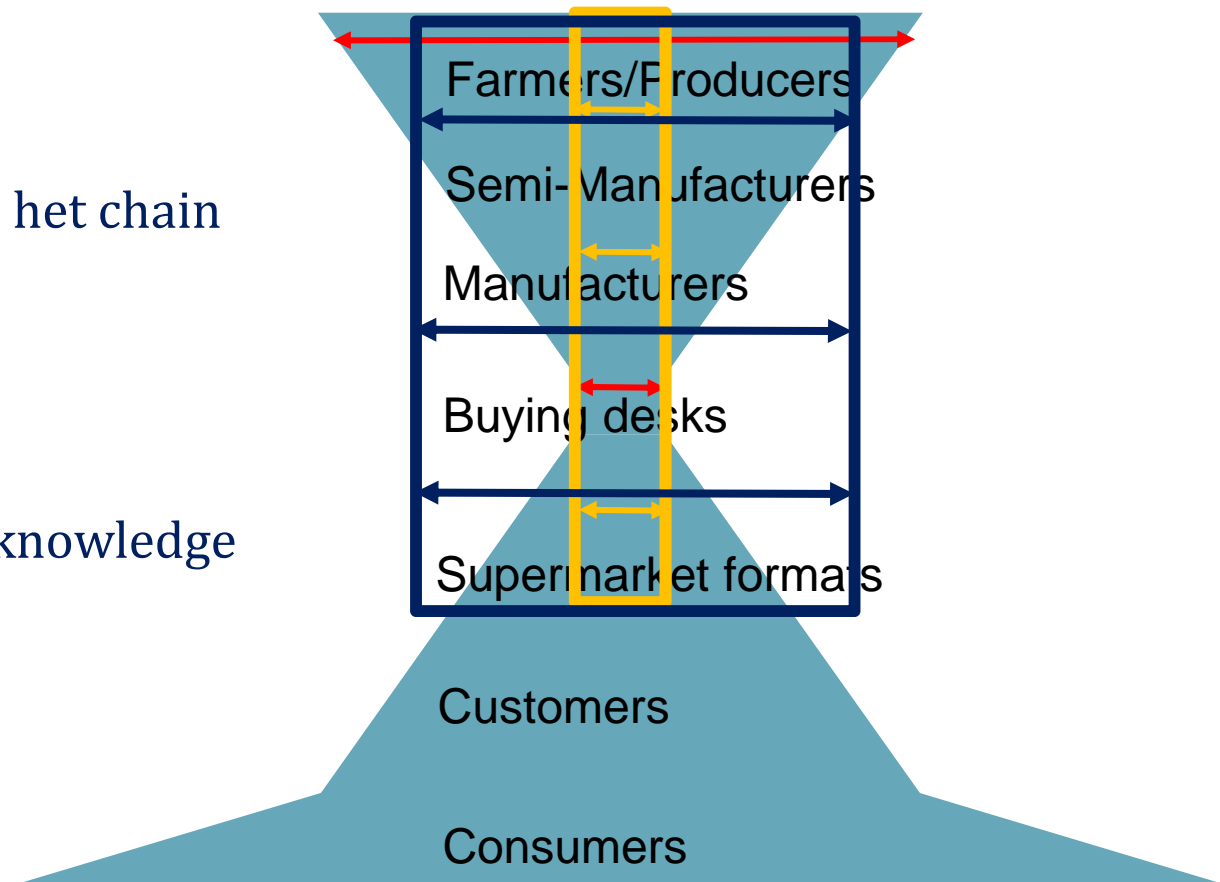
3. CURRENT EXPECTATIONS AND BOTTLENECKS

Bottlenecks:

1. Structural imbalance in het chain

2. Lack of market insight/knowledge

- CAP
- Conservative



4. CONCLUSIONS

- Market growth
- Producing \neq Creating value



Marketing

- Need for new business models
- Chain approach
- Collective responsibility

Chain, government, knowledge institutes



