

The expanding market for **slow-growing broilers**

Slow-growing Label Rouge broilers are entrenched in France, and the UK's welfare-approved flocks are gaining market share, but the Netherlands' slower-growing chickens dominate the fresh retail market.

BY GARY THORNTON

Slow-growing broilers will hold 90 percent of the fresh retail market for chicken in the Netherlands by the end of 2016, and the switch from conventional broilers to slower-growing chickens has been dramatic and swift — occurring in less than three years.

Speaking at the 2016 National Chicken Council Chicken Marketing Summit, Claude Toudic, technical manager, Hubbard France,

said that by 2020 all chicken meat sold in retail grocery stores in the Netherlands will be from slower-growing production schemes.

Already in 2016, between 25 percent and 30 percent of all Dutch broiler production is in slower-growing breeds and regimens, he said. The total share is offset to some degree by the fact that a large portion of the country's broiler production is exported. The

Netherlands is almost 200 percent self-sufficient for broiler meat.

Market segments for slow-growing chicken

With the Dutch market's switch from conventional broilers on fresh shelves for both dressed carcasses and cut-up chicken parts — and a lack of interest for the free range concept — Toudic said the market is now split in three segments:

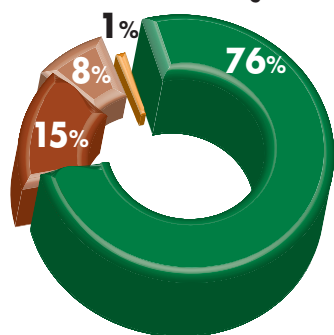
Better Life 1-Star broiler flock has lower stocking density for Hubbard JA757 broilers with access to 'winter garden' through pop-holes, at right.



Slow-growing broiler market share in France

Percentage of broiler chicken slaughterings in 2014

■ Conventional ■ Label Rouge
■ Certified ■ Organic



Source: Claude Toudic, Hubbard France, 2016 Chicken Marketing Summit; ITAVI

About 15 percent of broilers slaughtered in France are slow-growing Label Rouge breeds. Growth in the sector has plateaued since 2000 as consumers demand more cut-up chicken.

- Chicken of Tomorrow (COT) and New Standard Chicken (New STD) — 70 percent retail share — were introduced in 2013 and 2014 by retailers and the chicken industry in response to public pressure about fast-growing conventional broilers. Limits on average daily weight gains (ADG) are 50 grams for COT and 45 grams for New STD and other similarly less stringent standards than for alternative slow-growing production programs (see table, “Conventional vs. slow-growing broiler production standards, Netherlands”).
- Better Life 1-Star, introduced in 2007, has 20 percent retail

share. A 56-day indoor growing program with a maximum 42 gram per day ADG provides natural light for birds and “pop holes” for access to 20 percent to 25 percent additional floor space in “winter garden” or “porch.”

- Organic chicken meets EU and SKAL (organic control authority) requirements including access to fresh air and outdoor space (minimum 4 square meters run space) and organic feed (consisting of at least 20

SLOW-GROWING BROILERS

Conventional vs. slow-growing broiler production standards, Netherlands

Production system	Conventional (average)	Chicken of Tomorrow - New Ahold Chicken	Chicken of Tomorrow - New Standard Chicken (Jumbo)	56-day + Winter garden
Breed	Fast growing	Slower growing	Slower growing	Slow growing
Average daily gain g/day (lb/day)	±60-65 (0.13-0.14)	Max. 50 (0.110)	±45 (0.099)	±42 (0.093)
Killing age (days)	No limit	No limit	≥49 days	≥56 days
Density kg/m ² (lbs/ft ²)	42 (8.60)	38 (7.78)	30 (6.14)	25 (5.12)
No. broilers/m ² (ft ² /bird)	21 (0.512)	16 (0.672)	13.5 (0.797)	12 (0.897)
Extra material	No	Bales of straw + grain	Bales of straw + grain	Bales of straw + grain
Access to range	No	No	No	20-25% Winter garden
Use of windows	No	No	3% of floor surface	3% of floor surface
Lighting program	≥6h dark (of which 4h in 1 period)	≥6h dark	Natural daylight with ≥6h dark	Natural daylight with ≥8h dark in 1 period
Use of antibiotics	Avg 17.6 day doses/yr (2013)	Max 17 doses per year	Max 17 doses per year	Avg 0.5% of flocks treated (2015)
Stunning method	Electrical + CO ₂	Electrical + CO ₂	Electrical + CO ₂	2-phase CO ₂

Source: Claude Toudic, Hubbard France, 2016 Chicken Marketing Summit

A range of production schemes are used for slow-growing broiler flocks in the Netherlands.

percent grown at the farm or in the region from non-GMO grains).

Price ranges for chicken breast meat

Compared to breast fillets from conventional chickens, COT fillets are about EUR2 (USD2.2) per kg more expensive and Better Life 1-Star fillets are EUR2 per kg more expensive than COT, said Toudic.

The Chicken of Tomorrow and Better Life 1-Star chicken, nonethe-

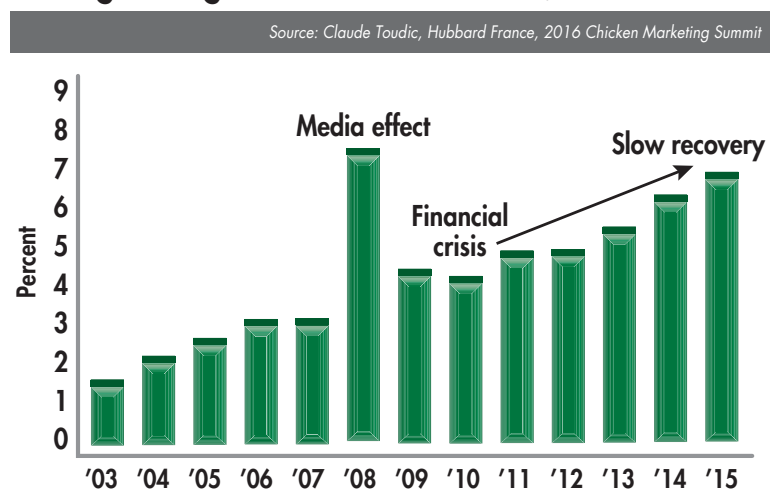
The UK market is sensitive to both animal welfare and price concerns. The long-term trend is for increased shares for slower growing breeds.

less, are competitive with pork meat, he said. Organic chicken, on the other hand, is more than three times more expensive than conventional chicken.

Plofkip chicken changed production

What led the Dutch poultry industry to such dramatic, rapid adoption of slow-growing broil-

Slow-growing broiler market share, UK



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ers? While consumers and activists in the Netherlands have had a long-standing concern with animal welfare, it was the plofkip chicken that triggered the takeover by slower-growing production schemes.

Plofkip in the Dutch language means exploding chicken. As Toudic explained, this was the central image of an advertising campaign conducted by the animal welfare activist group Wakker Dier (Awake Animal) in 2012.

The ad campaign played on consumer concerns about animal welfare with imagery of fast-growing (exploding) chickens. Comparing an organic chicken of 930 grams to a conventional broiler of 2,350 grams, the campaign portrayed the conventional broilers as barely able to walk and asked consumers to stop buying plofkip chickens and instead buy slower-growing broilers.

“The campaign has been extremely successful,” Toudic said.

“The communication has been focusing on restoring the link between what people eat and how

chickens are living. The word Plofkip [exploding chicken] has nearly 100 percent name recognition in the Netherlands and was chosen the most famous new word in Dutch language in 2012,” he said.

Attributes of slow-growing broilers

Toudic presented data showing welfare and carcass quality advantages for slower-growing broilers. Pertinent to the welfare messaging

SLOW-GROWING BROILERS

Slower growth's effect on broiler meat nutritional features

Chemical composition of breast fillet meat

Breed	Conventional	Conventional X Label Rouge	Label Rouge X Label Rouge
Age	6 weeks	8 weeks	12 weeks
Live weight (g/lbs)	2,496/5.50	2,650/5.84	2,877/6.34
% dry matter	24.95 ^b	25.35 ^b	26.29 ^a
% protein	23.83 ^b	24.30 ^{ab}	24.66 ^a
% fat	1.25 ^a	1.01 ^b	1.18 ^{ab}
Fiber section (μm^2)	2,168 ^{a1}	1,834 ^{ab}	1,719 ^b

*a, b significant at P<0.05; 13,000 μm^2 in 2012
Source: Claude Toudic, Hubbard France, 2016 Chicken Marketing Summit; Cecile Berri, et al., INRA France, 2005*

The lower fiber section for progeny of Label Rouge females prevents myopathy lesions (white striping and woody breast).

of the plofkip chicken campaign, a Dutch study evaluated chicken's walking ability and showed that slow-growing broilers have three times less trouble in walking compared to conventional chickens.

Slower growth's nutritional features

He also cited potential advantages for slower broiler growth in the lower fiber section for progeny of Label Rouge females which prevents

myopathy lesions (white striping and woody breast).

Additionally, progeny from the slow-growing Label Rouge breeding stock has higher fillet dry matter and higher protein content compared to

Live performance in representative conventional and slow-growing broilers

Production system	Conventional	Chicken of Tomorrow - New Ahold Chicken	Better Life 1*
Breed	Conventional	Hubbard JA987	Hubbard JA757
Mortality %	3.5%	2.5%	1.5%
Age (days)	40	49	56
Live weight (g/lbs)	2,400/5.29	2,400/5.29	2,400/5.29
Feed conversion ratio (FCR)	1.6	1.9	2.1

*COT AH: 1% less mortality than Conventional and + 30 points FCR Better life 1 is 20 points FCR higher than COT AH
Source: Claude Toudic, Hubbard France, 2016 Chicken Marketing Summit

Feed conversion efficiency is not as favorable for slower-growing broilers but flock mortality is lower.

conventional broilers. And the intermediate cross (as used for RSPCA, Certified and BLK 1-Star breeds) has more dry matter and protein and lower fat content.

Improved tenderness and flavor profile

Age is the main factor involved in the evolution of tenderness, juiciness and flavor, according to data present-

ed. However, the research report stipulated that the best compromise varies with eating culture and experience.

The consumer and the citizen

“Consumers are looking for price, convenience, food safety and taste in the chicken they buy,” Toudic said. But more and more consumers are equally concerned about the price and the animal wel-

fare aspects associated with their chicken consumption, he indicated.

“With the consumer-citizen no longer having any relationship to agriculture, they follow social networks and are influenced by the animal welfare associations. The consumer often acts differently to the citizen, but the general population’s awareness of all of these issues is growing,” he concluded. ■