



NZ Egg Industry Conference 2017

Millbrook - Queenstown

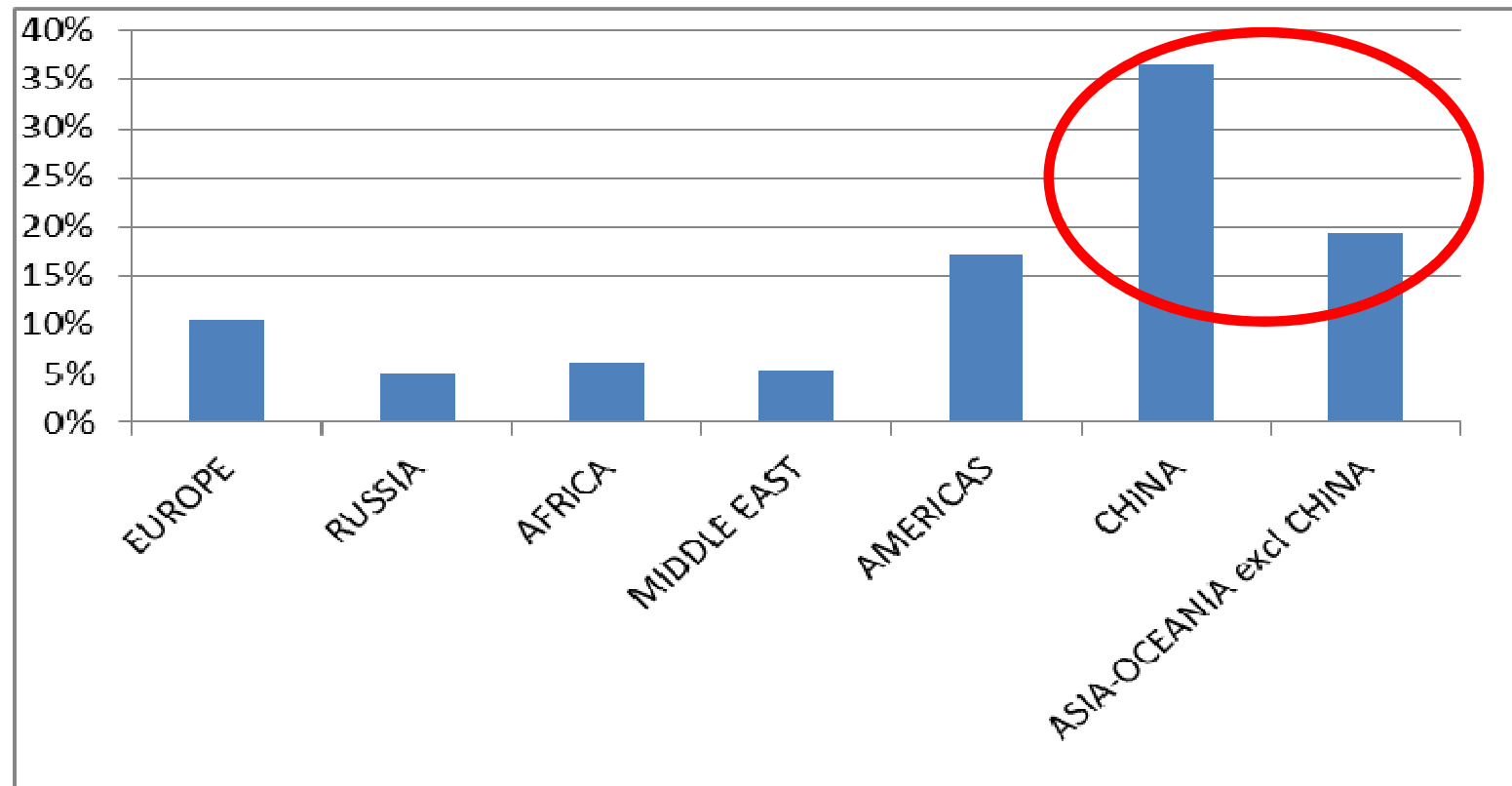
Benoît PELE

Managing Director

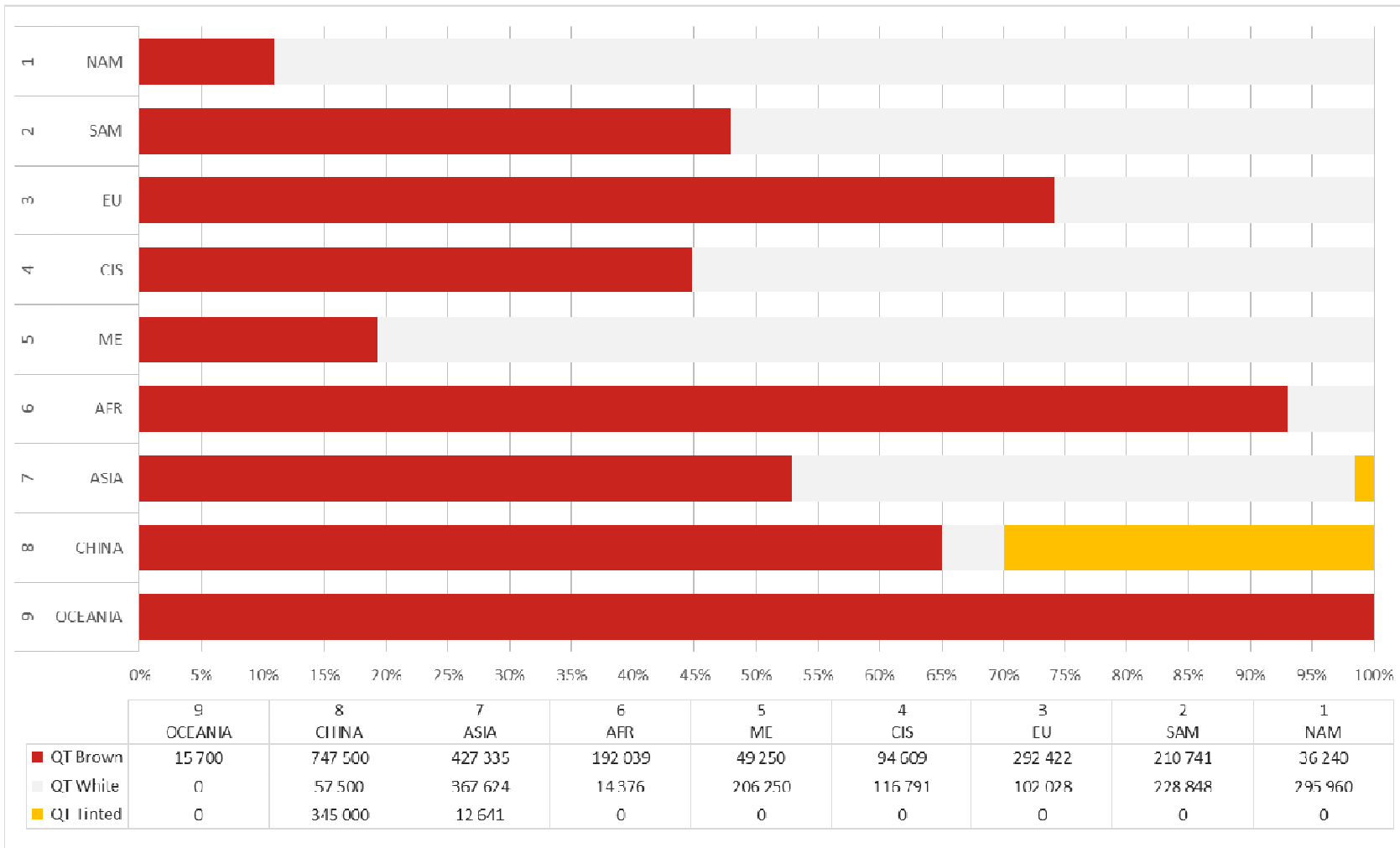
Global Egg production in a changing world

The egg world is changing rapidly

- About 4 Billions Commercial Egg Layers in the world
- 55% of the Commercial Egg layers in Asia (19%) and China (36%)



Proportion of egg shell color in the world.



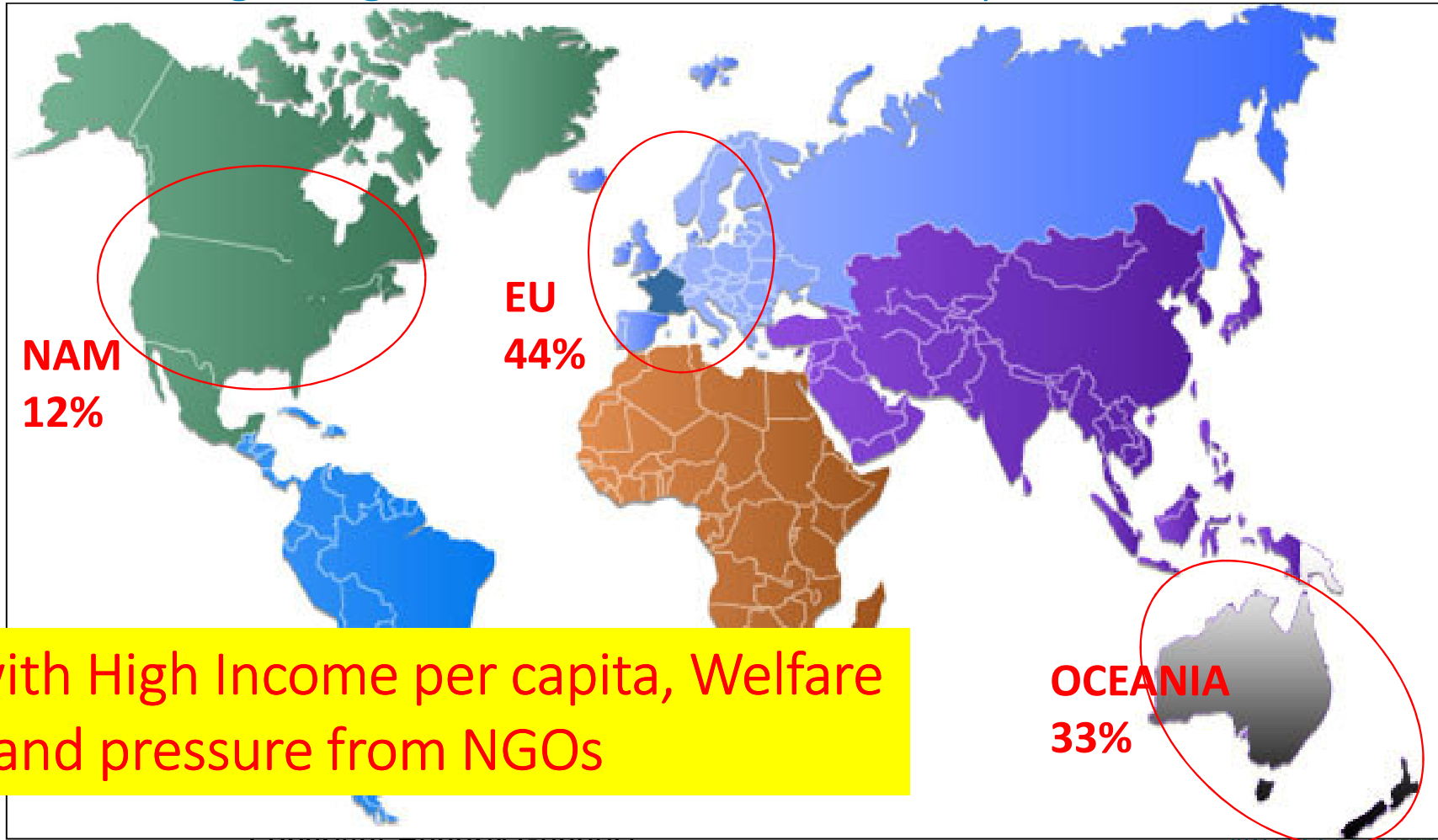
Shell color:

- 54% Brown
- 37% White
- 9% Tinted

2 056 M Brown
1 410 M White
357 M Tinted

Where is the true « alternative/ non-cage » production?

= Aviary, Free Range, Organic → total 212 Million Layers



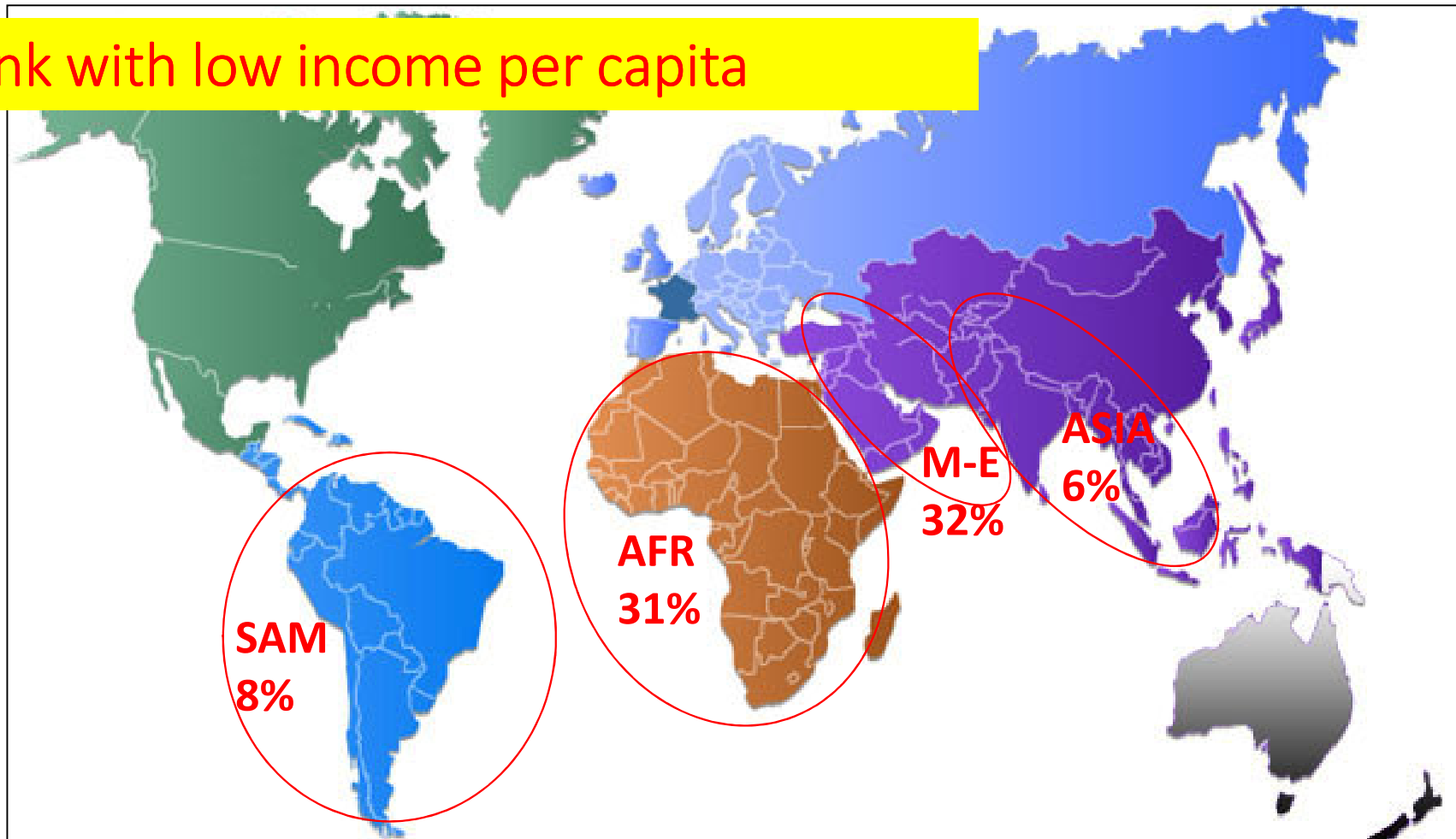
Link with High Income per capita, Welfare and pressure from NGOs

Copyright Hendrix Genetics

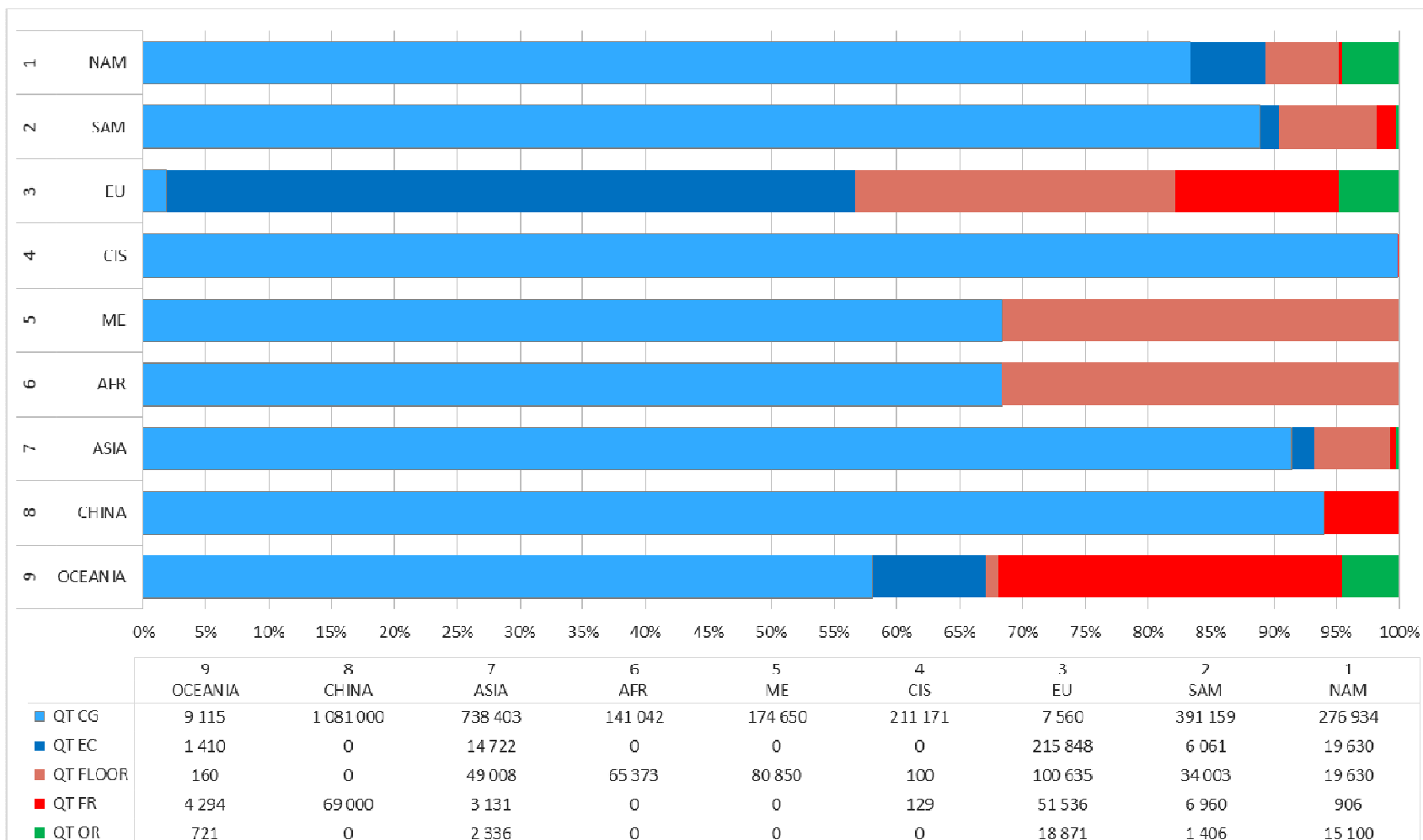
Where is the « non-cage » production because of low economy?

→ Floor systems in stead of cages for a total 243 M layers

Link with low income per capita



Production Systems for Commercial egg layers.



In the world:

Conv. Cages : 80 %

Enriched Cages: 7 %

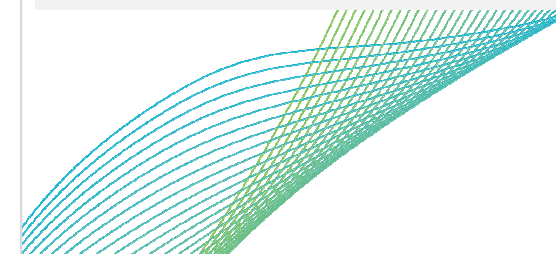
total cages → 87 %

Floor /Aviary: 9 %

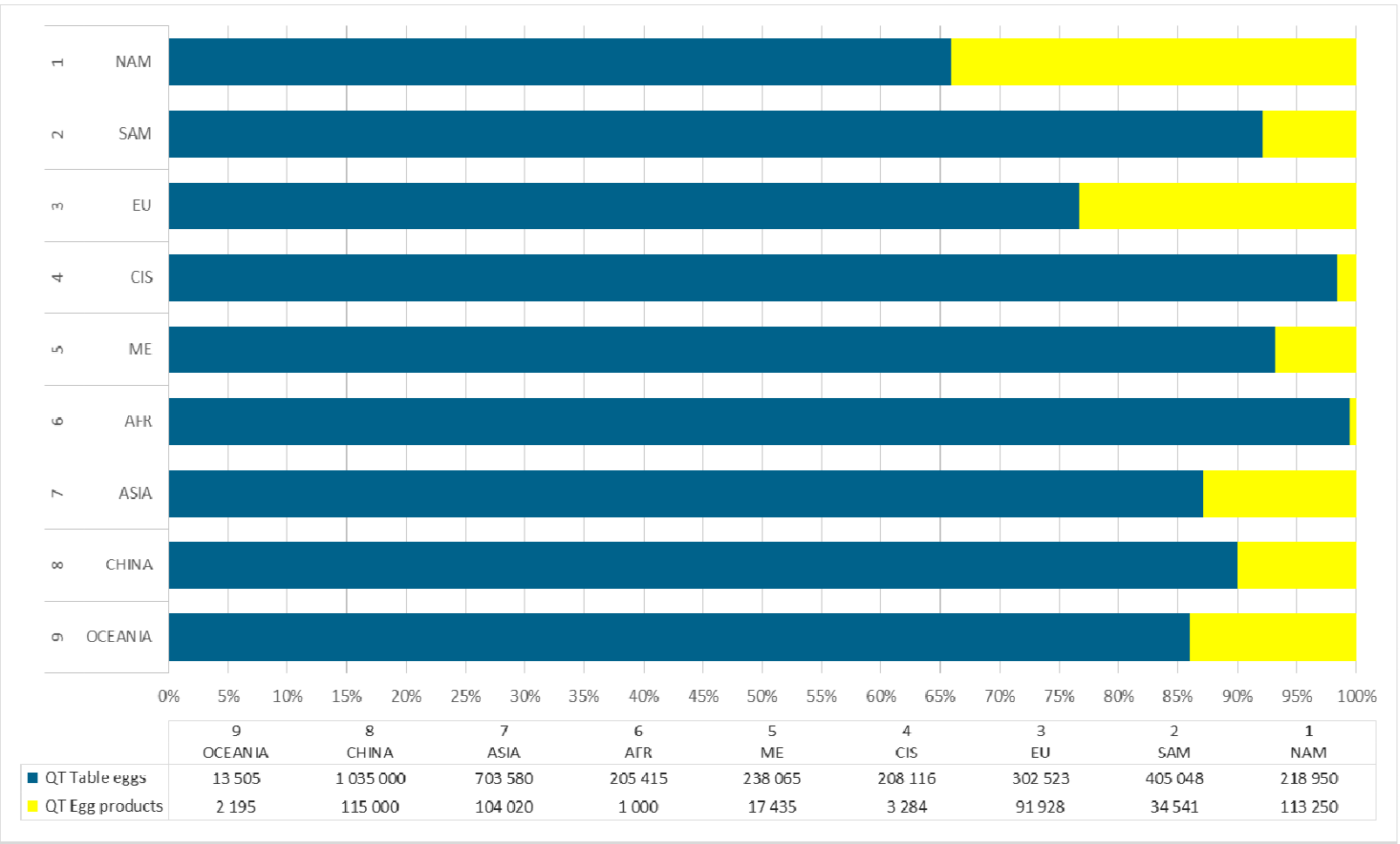
Free Range: 4 %

Organic: 1 %

total non-cages → 14 %



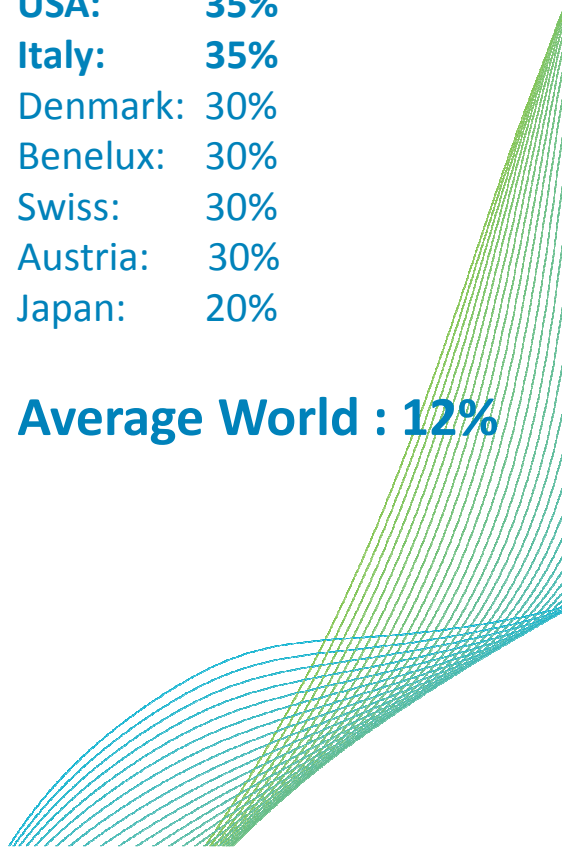
Shell egg market (88%) and Industry egg products (12%)



Processed eggs per country:

- France: 40%
- USA: 35%
- Italy: 35%
- Denmark: 30%
- Benelux: 30%
- Swiss: 30%
- Austria: 30%
- Japan: 20%

Average World : 12%



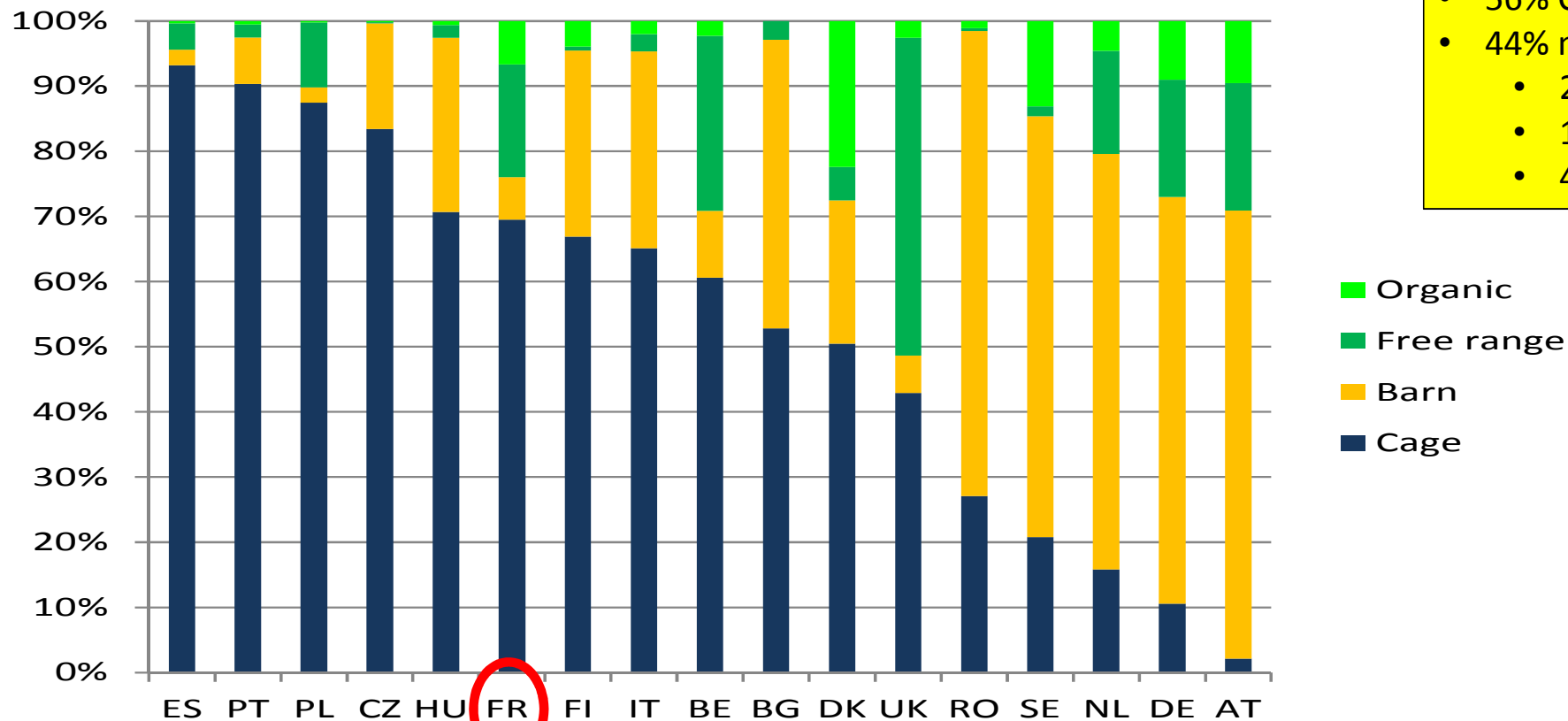
Different rules for keeping the laying hens

Production method	Eggs from caged hens code 3	Barn eggs code 2	Free range eggs code 1	Label Rouge free range eggs code 1	Organic code 0
Type of animal husbandry	Closed environment, in cages	Closed environment	Free range	Free range	Free Range
Size of farm	No maximum size (up to 300,000 hens)	No maximum size	No maximum size	2 poultryhouses of 6,000 hens maximum	3000 hens maximum/building
Stocking rate inside the henhouse	750 cm ² of cage area per hen (13 hens/m ²)	9 hens per m ²	9 hens per m ²	9 hens per m ² usable area on the ground (only 1 level)	6 hens/m ²
Outdoor surface area	-	-	4 m ² / hen minimum	5 m ² / hen minimum	4 m ² / hen minimum
Feed for laying hens				50 % minimum cereals	95 % organic feed
Third-party inspection	-	-	-	Approved certifying	Approved certifying

Itavi from European Commission

Contrasting housing systems in the EU

Types of housing for laying hens in the EU in 2015:

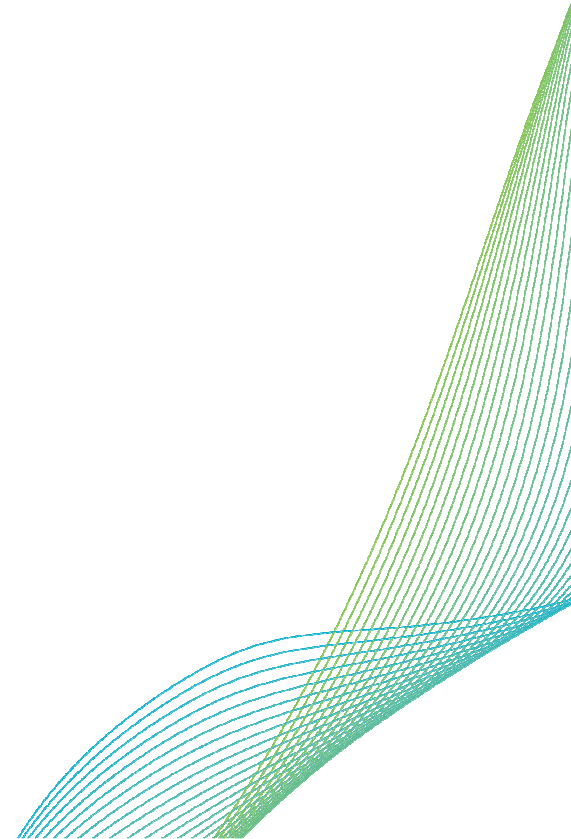
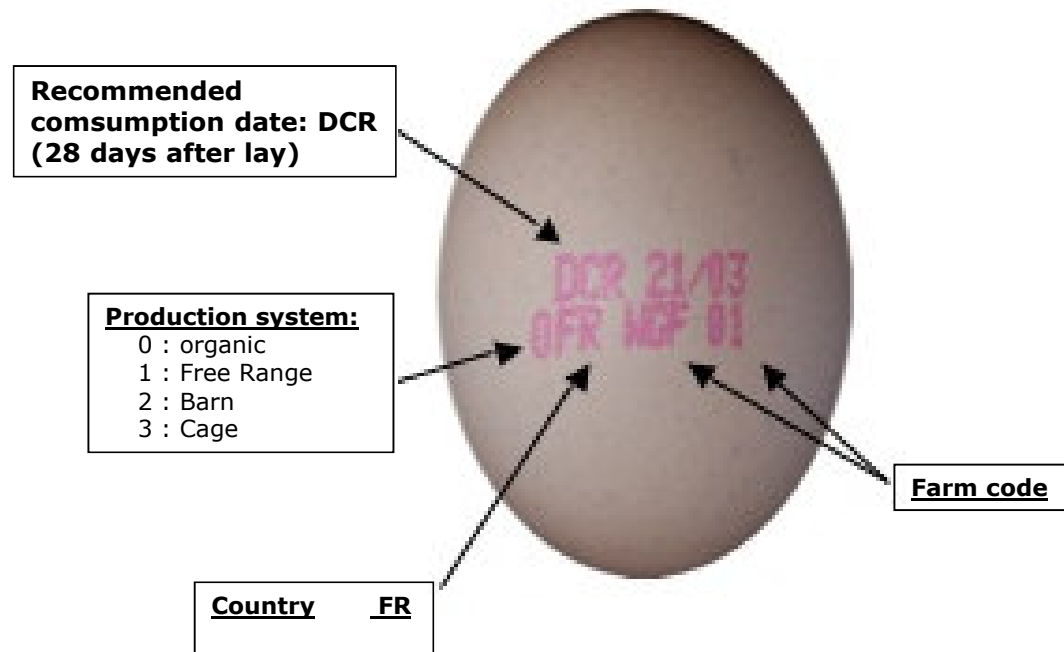


375 Millions layers:

- 56% Colony cages
- 44% non-cages
 - 26% Barn
 - 14% Free Range
 - 4% organic

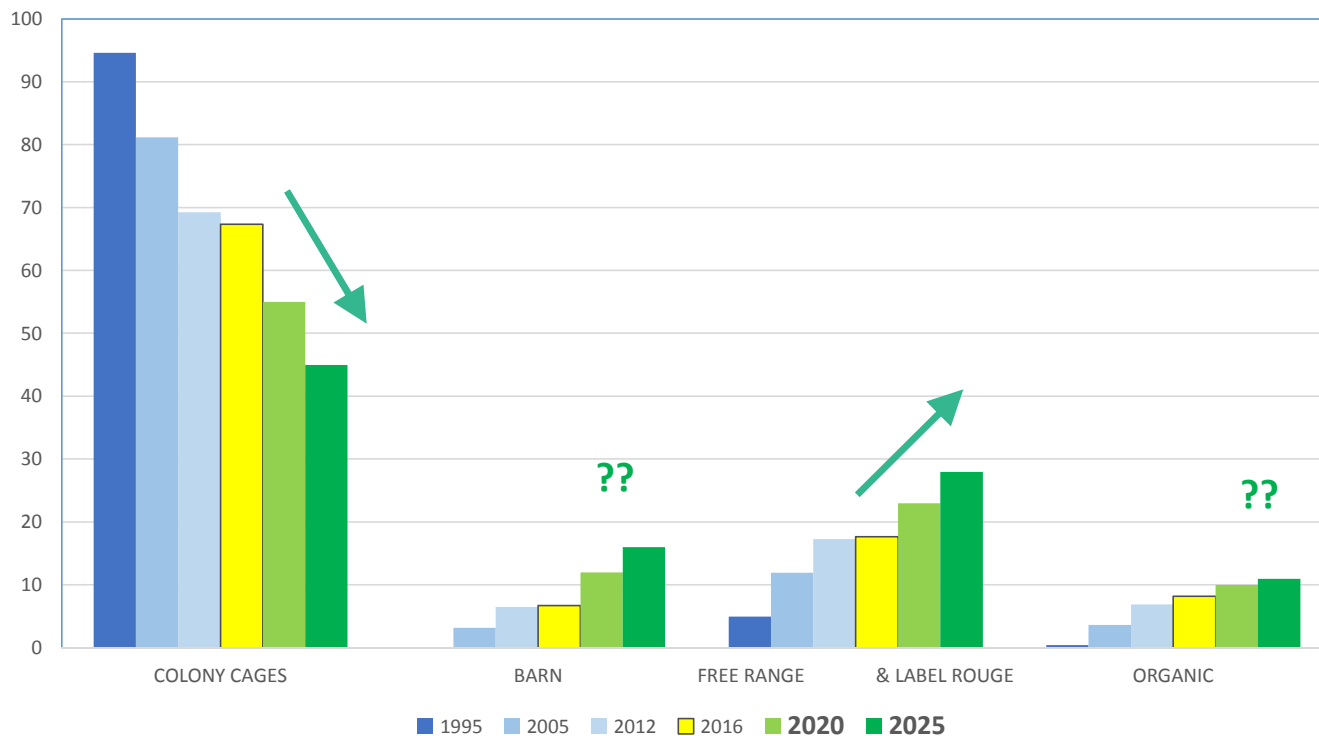
from EUROPEAN Commission.

Rules with marks on the eggs



The most probable scenario of egg production systems in the next 5-10 years in FRANCE.

Evolution of egg production systems in France

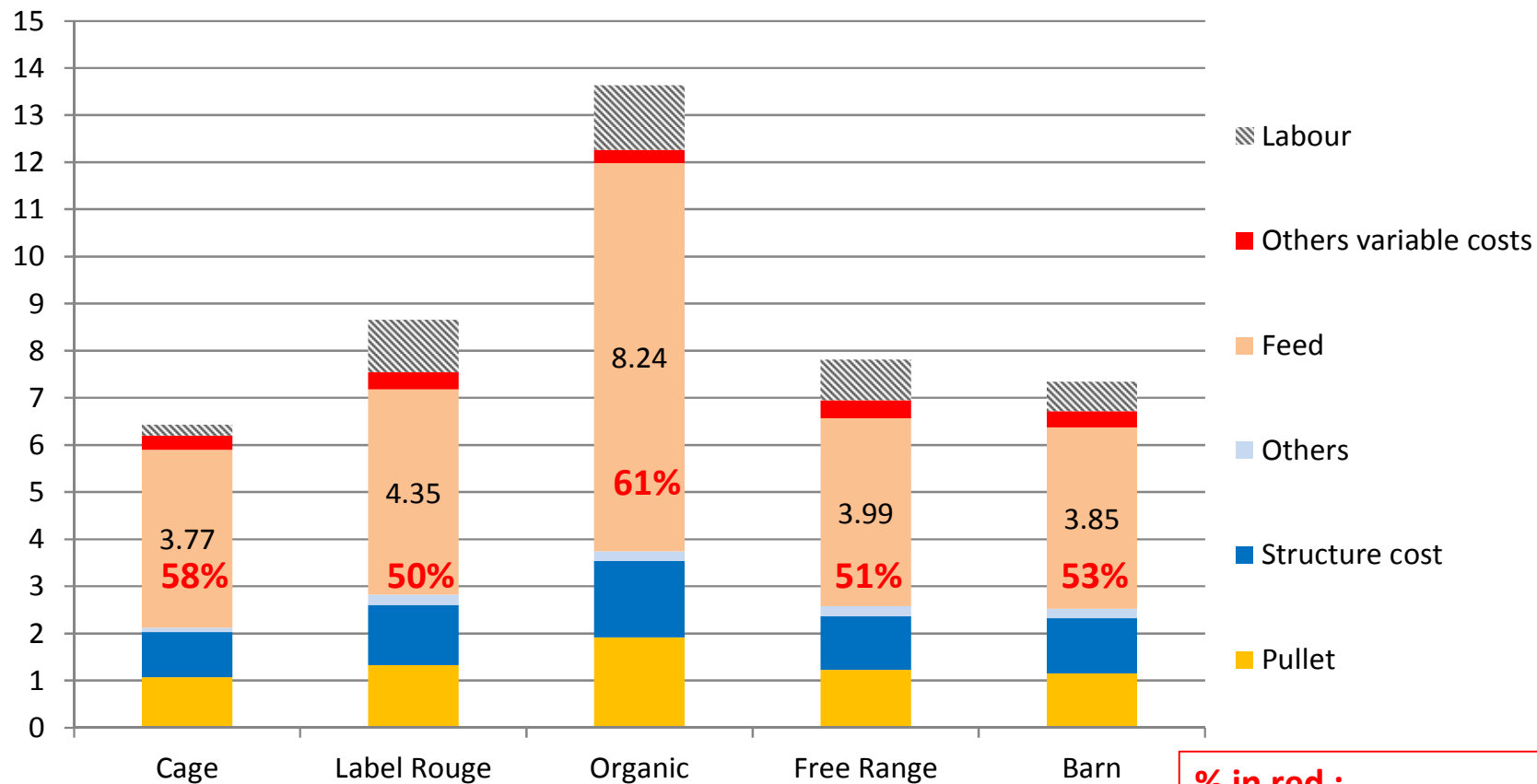


by 2025: 47 Millions egg Layers

- Decrease of colony cages to 35-45%
- Increase of free range systems till 30%
- Find new marketing for barn eggs ??
- Difficult growth of Organic eggs

Consensus between
Supermarkets and NGO
and
Egg production constraints

Production costs in different production systems (in Euros/ 100 eggs)



Itavi calculations. 2014.

**% in red :
Proportion of feed cost**