

Egg Industry

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The impact of welfare

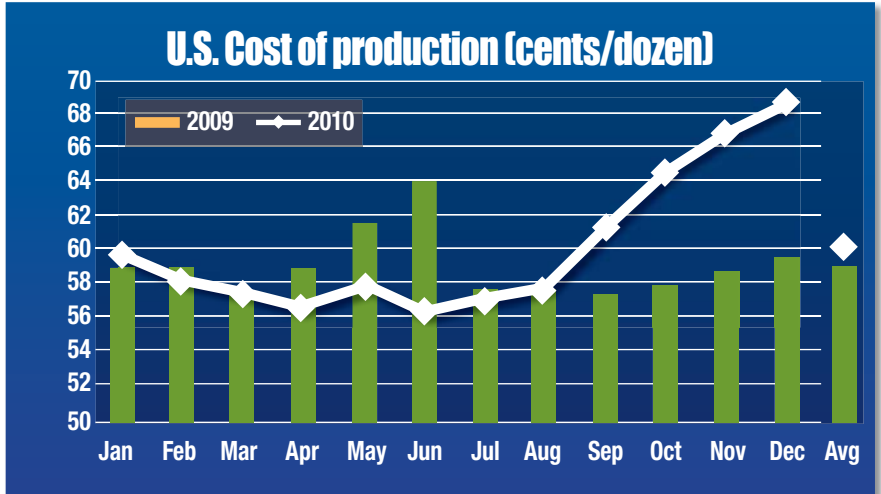
The bottom line for U.S. egg producers is that welfare is a significant driver for production systems and that decisions made in 2011 will influence production techniques, marketing and profitability for at least two decades.

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2011 Midwest Poultry Federation Convention preview

The annual Midwest Poultry Federation Convention is generally acknowledged to be the most informative program for egg producers.



The U.S. estimated (6-Region) cost of production for December 2010 was 69.4 cents per dozen ex-farm, which is 1.7 cents per dozen or 2.5% more than in November.

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EDITORIAL

BY DR. SIMON M. SHANE

The welfare issue

This edition of *Egg Industry* is devoted to the poorly defined concept of “welfare.” The term has a different meaning depending on the perceptions and outlook of the observer. Those applying an anthropomorphic approach condemn in the most extreme terms any form of confinement and regard intensive production of food as “exploitation.” The more reasonable among us consider laying hens to be worthy of protection from neglect and cruelty and to be provided with housing that is based on sound scientific and financial principles.

Changes in consumer perceptions, whether real or perceived, are influencing legislatures, regulators and the major food distribution chains. The awareness of “welfare” as a marketing reality has been recognized by the American Humane Association, which has established reasonable standards for housing and management. This contrasts with extremist groups such as PETA and the HSUS, which have as their objective the imposition of a vegan lifestyle on

our population. Their activities deprive consumers of choice while deceiving their supporters as to their concern for livestock and companion animals in their fundraising activities.

As with any major influence on production efficiency and profitability, the egg industry will collectively adapt to the operating and regulatory environment and apply technology to resolve problems. Although additional costs will be imposed by adoption of innovations such as enriched caged systems or more extensive use floor housing, the demand for eggs in both shell and liquid form will continue. This opinion is based on the inherent nutritional quality of our product in relation to other sources of protein.

It is hoped that the program to evaluate alternative housing systems at Michigan State University, initiated by Dr. Jeff Armstrong, will become a reality despite his move to California. The

industry needs valid U.S. scientific data to counter emotion and unrealistic demands made by extremist groups that influence consumers and legislators.

The egg industry will collectively adapt to the operating and regulatory environment and apply technology to resolve problems.

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The impact of **welfare**

Decisions made in 2011 will influence production techniques, marketing and profitability for decades

By Simon M. Shane

About two decades ago an industry leader opined, “Welfare is not going anywhere; it’s a European thing.” At the time I expressed reservations, citing the changes which were imposed on medical researchers with regard to the care and use of experimental animals. Although a few stalwarts rejected the notion of consumer concern fueled by animal rights and welfare activists, the majority of the industry, to their credit, recognized the inevitability of changes in housing and production practices.

A valuable preemptive approach by the industry was exemplified in the initial United Egg Producers certification program. Despite a contentious start requiring some changes, this program appealed to responsible consumers and certainly was a reasonable response to members of the Food Marketing Institute and the National Chain Restaurant Association for uniform standards and an audit program.

Welfare is an emotional issue that encompasses ethics, religious principles, economics and oversight by state and federal agencies. There is no question that welfare has been markedly influenced by events in Europe. The rise of the “Green Movement” coupled with the reality that a high proportion of the EU budget was used to sustain agricultural production created an environment conducive to restrictions on housing systems for flocks. Alternatives to conventional cages appeared at successive VIV expos in Holland and DLG Huhn und Schwein exhibi-



Hens housed in a Facco EVO enriched cage module complying with EU requirements

present time and refinements are expected on an ongoing basis.

Proposition 2

California Proposition 2 was a wake-up call for the industry. The run up to the ballot initiative clearly showed the financial clout of organizations such as PETA and the HSUS which have agendas extending beyond regulation of housing. The magnitude of the “pro” vote confirmed opposition to caged housing, albeit distorted, as presented by opponents of intensive animal production. The fact that calves and hogs were included in the Proposition promoted passage of the initiative. Ballots dealing with tethered sows have passed in Arizona and Florida and the concessions made by producers in Michigan appeared to confirm a national movement which was gaining momentum.

The situation has to a large extent been reversed by the establishment of Boards to rule on livestock welfare in non-ballot states. The settlement in Ohio, which represented a virtual retraction by HSUS in the face of strong opposition, was regarded as a retraction by HSUS due in part to the disclosures by Humanewatch.org. Where the vaguely worded standard HSUS “confinement clause” has been put before the public, there has been a marked split between urban and

rural voters. States with constitutions which permit ballot initiatives and which have a large proportion of affluent, elderly and liberal-leaning urban voters relative to rural population represent a prime target for the HSUS and kindred organizations.

On balance, the poultry industry has responded positively to the profound pressures which are influencing change. The UEP and producers of branded eggs have adopted a policy of offering choice to consumers. Currently eggs can be purchased



Chore-Time VERSA enriched cage under trial

New EU hen housing uses ‘wheel-like’ concept www.WATTAgNet.com/15945.html

tions in Germany during the late 1970s. To a large extent, the development of alternatives to conventional cages still continues to the

from a variety of housing systems. Unfortunately there is considerable confusion as to the definition of terms such as “free-range,” “free-roaming,” “cage-free,” “non-confined,” “enriched housing” and “all natural.” Even the regulations governing production under the statutory USDA-administered NOP “organic label” are under review. This is viewed by many as less a function of welfare than a thinly veiled approach to production control, discriminating against commercial-level operations.

The US approach to flock welfare

To develop, implement and regulate a program of flock welfare it is necessary to consider the following concepts:

- A clearly stated set of objectives.
- Clear definitions describing specific systems.
- A set of science-based standards which are realistic, practical and which relate specifically to the welfare of flocks.
- Consistent, reliable and ethical auditing to ensure compliance with predetermined standards.

To be effective, flock welfare must be based on scientific evaluation and standards must be accepted by all stakeholders in production, sales and consumption both for the institutional and domestic markets. It is critical to avoid confusing “welfare” with production practices and inferred attributes such as those mandated by the National Organic Program. This concept has been clearly expressed by the American Humane Association which imposes science-based standards and auditing. The organization

has correctly questioned what appear to be arbitrary outside access requirements for flocks producing eggs with the NOP seal.

It is axiomatic that less-intensive production systems involve higher housing, labor and production costs compared to confinement in cages. This is where choice enters the equation. To charge more for an organic or “free-range” egg, which is produced at a considerable cost to conform to rigid requirements which are not scientifically justified, requires a higher selling price.

The extent to which consumers are willing to pay for the additional costs of production, dis-

tribution and retail markups for “welfare-produced” eggs has yet to be determined. During the recent recession, consumption of organic eggs declined as consumers substituted “cage-free” and “all-vegetable” substitutes. The higher the cost of a commodity, the smaller is the market segment willing to expend a proportionally higher purchase price for attributes which may or may not be quantifiable in terms of safety, quality or personal satisfaction.

The current situation regarding alternatives to cages

Despite the events, disclosures and activities of anti-confinement activists and adverse publicity during the past decade at least 90% of the nation’s 290 million hens are housed in conventional cages. Of the remainder, systems include purpose-built floor housing on slats and litter, converted broiler breeder units and more recently, the emergence of aviaries. At the current time all floor systems can qualify for organic production rules providing flocks are allowed token access to the exterior of the house.

Proposed rules under consideration by the NOP would appear to discriminate against large in-line aviary complexes with total flock sizes ranging from 200,000 to 700,000 hens. In contrast to the UK and segments of the industry in continental Europe, free-range systems have not been adopted to any extent in the U.S. Climatic factors, disease and parasitism, labor cost and competition from lower-priced conventional and barn-housed eggs have limited the development of extensive on-pasture housing which will remain an insignificant niche in our overall production.

Floor-systems Non-confined “barn” systems generally comprise purpose-built houses fitted with slats, manure belts or scrapers, mechanical nests for egg collection, chain feeders and nipple drinkers and with insulation and ventilation appropriate to the area of operation. In the Southeast, surplus or obsolete broiler breeder units have been converted to producing brown eggs. In some cases, small high-rise cage houses have been converted to floor systems with the installation of plastic slats. With appropriate stocking density, management programs and stockmanship, floor housing can produce eggs conforming to breed standards. The major problems remain cannibalism, parasitism, soiled eggs and higher production costs relative to cages.



Information on equipment including specifications and contacts can be obtained from supplier websites:

Big Dutchman:
www.bigdutchmanusa.com

Chore-Time Egg Systems:
www.choretimeegg.com

FACCO:
www.facco.net

Farmer Automatic:
www.farmerautomatic.com

Jansen Poultry Equipment:
www.jpe.org

Salmet:
www.salmet.de

Tecno:
www.poultryequipment.com

Vencomatic:
www.vencomatic.ca

Aviary systems

During the late 1970s, aviaries were introduced into the EU to increase return on investment through higher stocking density compared to conventional floor units. Multi-tier aviary modules allow flocks to make use of the cube volume of housing. Modules are fitted with communal nets with a belt collection of eggs, mechanical feeders and drinker lines. The relatively high density in the houses requires appropriate ventilation.

Although representing a high capital cost for the building and installations, appropriate rearing and management egg yield and quality generally contribute to an acceptable return on fixed costs. For some time Big-Dutchman, Jansen, Vencomatic, Salmet, Farmer Automatic and Chore-Time have offered systems to producers in the U.S. and Canada building on experience in the EU. There are a number of functional complexes in the U.S. successfully producing both “cage free” (non-confined) and organic certified eggs.

Enriched and enrichable systems

In response to the proposed 2012 EU ban on conventional cages and following re-

search at institutions in continental Europe, producers in Germany and other western EU nations have adopted enriched caged systems as an alternative to conventional housing. Enriched modules incorporate the advantages of both floor and caged systems, maintaining confinement but offering an apparently superior environment from the perspective of behavior. Germany converted a high proportion of conventional production to enriched cages and the system is being adopted in the UK.

In the EU, eggs are individually stamped with the production system designating “free-range,” “free-roaming in barn” or “confined to a cage.” A detailed Opinion Paper on enriched cages was released by the UK Farm Animal Welfare Council in November 2007 to which readers are referred for a scientific assessment of the merits of the system compared to conventional cages. www.fawc.org.uk. Current EU regulations, however, assign a “caged” stamp to enriched systems. This reduces the value of eggs produced and does not allow farmers to recoup the higher capital costs associated with enriched cages and the low stocking density of approximately 120 inches²/hen. Most German supermarkets will not sell eggs bearing the “caged” designation.

Following the advent of California Proposition 2, expansion and re-caging in the state ceased. Plans for new complexes to replace obsolete units were shelved. Traditionally

and the “hen-cam” can be accessed at www.jswest.com.

J.S. West has initiated a lawsuit naming the State Attorney General as the Defendant with the objective of demonstrating that the unit conforms to the requirements of Proposition 2 with respect to freedom of movement and provision of space for hens to move and stretch their wings, scratch and perch. It is understood that the eggs from this unit are sold through a large supermarket chain under a specific “comfort” designation at a premium of approximately 25 cents per dozen.

Re-caging and uncertainty

Proposition 2 and subsequent California legislation, the possibility of additional state ballot initiatives or an unlikely “federal approach” by HSUS has created a dilemma for the industry. Since the American Humane Association has established standards for certification for enriched cages, there is considerable interest in the system, irrespective of the outcome of the case initiated by J.S. West.

It is a reality that many producers especially in the Midwest wish to upgrade their conventional high-rise houses to increase stocking density and at the same time reduce the risks associated with *Salmonella enteritidis* infection, inherent to storage of manure for prolonged periods in pits. The resolution of the impasse between the uncertainty

with the exception of the feed supply to the scratch area. The cost of conversion of each enrichable module will be approximately \$70 to \$75. In addition, stocking density will be decreased from 67 inches² per hen to 118 inches² per hen or a 40% reduction from 108 to 61 hens per 12-foot module.

The impact of the availability of enrichable cages was noted by Terry Pollard, marketing manager for Big Dutchman. He indicated that in mid-2009, 60% of prospective clients were considering the purchase of enrichable systems. By the end of 2010 this had increased to 90% of prospects requesting quotations. During the past year AVEC systems represented over 90% of the company’s sales of confined systems.

Chore Time has developed their own line of enrichable cages with three units of between 150,000 to 200,000 hens currently in production and additional houses on order or undergoing installation. European manufacturers including Farmer Automatic, Facco and Techno have enrichable cages in their product programs which are essentially European models conforming to Directive 1999/74/CE, adapted to be compatible to U.S. conditions.

The future of welfare

The bottom line for U.S. egg producers is that welfare is a significant driver for production systems and that decisions made in 2011 will influence production techniques, marketing and profitability for at least two decades. Whether considering shell egg or liquid production, producers are acutely aware of the additional capital costs represented by both equipment and housing associated with units operated at low density with welfare refinements.

The question arises as to whether consumers are willing to compensate producers for the costs involved in enriched cage systems. The interim but necessary selection of enrichable cages may be regarded as an insurance against future marketing or legislated imperatives which may cause conventional cages to be obsolete by the middle of this decade. There do not appear to be any production-related advantages associated with enhancing the “welfare” of cage systems since the major white-feathered strains of hens housed according to current UEP standards achieve their genetic potential under optimal conditions of nutrition, management and prevention of disease. **E**

The question arises as to whether consumers are willing to compensate producers for the costs involved in enriched cage systems.

California has imported approximately one-third of the eggs consumed in the state. Faced with the prospect of an influx of less expensive Midwest eggs derived from cages, the California Legislature banned the introduction of eggs produced from systems which were not in compliance with Proposition 2.

The question of interference with interstate commerce and the meaning of California Proposition 2 will be the subject of prolonged legal actions. J.S. West, a progressive family-owned producer in Northern California, installed a Big-Dutchman enriched system as a commercial-scale demonstration unit. The house is under video surveillance

concerning future requirements and the imperative to upgrade conventional cages may be resolved by installation of “enrichable” cages.

Big Dutchman offers the AVECH II line of products to provide flexibility. Enrichable cages cost approximately 10% to 15% more than conventional cages operated at the same stocking density of 67 inches²/hen. These units can be converted at a subsequent time to conform to AHA enrichment standards for certification. It takes approximately 30 minutes to convert each 12-foot section by installation of a nest box, scratch area and perches. Feeding and nipple systems remain unaltered

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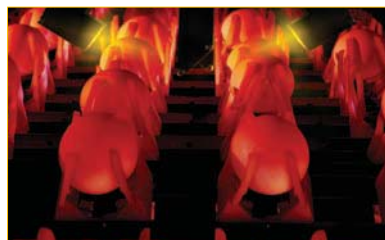


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Tim Amlaw interview: AHA involvement in livestock welfare

Discussion of certification program and the future of the Industry

Tim Amlaw was appointed vice president of the American Humane Certified Farm Animal Program in April 2010. The program was initiated and is administered by



Tim Amlaw, vice president of the American Humane Certified Farm Animal Program

the American Humane Association, headquartered in Washington D.C., with offices in Englewood, Colorado. Amlaw has more than 35 years of experience in agriculture and livestock production. Prior to joining the American Humane Association in 2007 as the program manager of the American Humane Certified initiative, he was the CEO of Beef Plus Inc. where he was responsible for a branded beef product distributed by Nobel-Sysco, a food services company. He has extensive experience in government regulation and compliance in the beef industry and has taught agricultural education to high school and college students. He continues to speak at national meetings and to serve on industry panels.

Egg Industry: Please explain the American Humane Association involvement in livestock welfare.

Tim Amlaw: The American Humane Association has been involved with animal welfare since 1877, when our organization was instrumental in developing standards for transport of livestock. The AHA has been at the forefront of a number of major initiatives to protect children, pets and farm animals from cruelty, abuse and neglect for over 130 years.

EI: How did the AHA become involved in the welfare of poultry flocks?

TA: The concept of a science-based set of standards and a complementary auditing program was developed prior to my joining the AHA in 2007. Discussions with Eggland's Best and the United Egg Producers established a need for an independent, reputable welfare organization to develop humane solutions equitable to both producers and consumers. It was felt that the legacy established by the AHA, together with their

EI: How have you positioned the AHA Certification Program?

TA: The American Humane Association has always projected a reasoned voice representative of the mainstream of our population. We respect the right of consumers to choose what they wish to eat. We feel strongly, however, that no producer has the right to abuse or neglect livestock. Our standards were influenced by developments and trends in the EU over the past 20 years where studies by universities and institutes yielded a wealth of scien-

▶ It is our belief that 30% of the industry will be housing hens in other than conventional cages in ten years' time.

history of protecting livestock, pets and children in a constructive and non-confrontational manner, would be beneficial to the success of a national program for poultry and livestock.

EI: Please indicate some of the drivers for the AHA program.

TA: The welfare of laying hens in the EU was established by the directive 1999/74/EC which established standards for types of housing, including enriched cages, confined floor units, aviaries and free-range. The LayWel project was established to produce a series of science-based reports on the welfare of laying hens housed under various systems in the EU. The LayWel report considered a series of seven packages, including definitions and indicators of welfare, descriptions of housing systems, flock health, behavior and stress, productivity and quality and an assessment of integrated welfare.

tific information to evaluate welfare. It was our objective to balance sound science and aspects of practical production to develop appropriate fact-based standards and an effective third-party audit system capable of handling millions of birds. The AHA receives regular input from scientists, including Dr. Inma Estevez of Neiker-Tecnalia in Spain, and from field studies in the Netherlands and five locations in the U.S. Video camera studies are helpful in understanding the behavior of hens under commercial conditions. The Certification Program was extensively evaluated by major companies purchasing eggs and derived products and received their support.

EI: What are the advantages of AHA Certification to producers?

TA: We believe that the legacy and heritage of AHA provides credibility for our program. This is a major factor which is appreciated by large supermarket chains

and industrial users of eggs and distinguishes the AHA program from competitors. We recognize that to be successful, the program must represent a combination of business concepts, the legacy component and above all our credibility. The AHA program provides producers with a valid and rigorous recognition of acceptable housing and operational procedures.

EI: Please describe your audit program.

TA: When we established the program we recognized the need to have experienced and qualified auditors. We prefer to audit to ISO principles and our auditors must have at least 12 years of experience with a given species, preferably with a degree or equivalent training and qualification in some aspect of animal agriculture. Our program also incorporates video monitoring.

EI: How do you foresee development of the U.S. egg production industry?

TA: I believe the industry is in transition. This will obviously be consumer-driven with an increasingly greater emphasis on welfare. It is our belief that 30%

of the industry will be housing hens in other than conventional cages in ten years' time. The choices are obviously aviaries or enriched colony units. We recognize that since the advent of California Proposition 2 there has been considerable reluctance by producers to either re-cage or expand, especially in states with constitutions that allow for ballot initiatives. We look forward to a resolution of the current situation so that the industry can move forward with confidence according to established standards for animal welfare based on scientific findings.

EI: In mid-December you addressed a letter to the National Organic Program questioning their approach to flock welfare. Would you like to comment on this?

TA: We questioned the science driving the direction in which they are heading. In effect, welfare has nothing to do with the organic status of a product. If science is the major criterion determining the organic status, then we believe that the American Humane Association standards should form the basis of the NOSB requirements

in the interest of standardization. If, however, the welfare aspect of the NOP is market driven and designed as a means to limit production, the integrity of the NOP is in question. We would not be favorable to any approach that is designed to exclude existing producers who have complied with organic standards to date and who may be faced with disqualification due to competition by imposing restrictions that have no scientific basis in behavior, physiology, health or safety.

EI: Do you have any message for the industry?

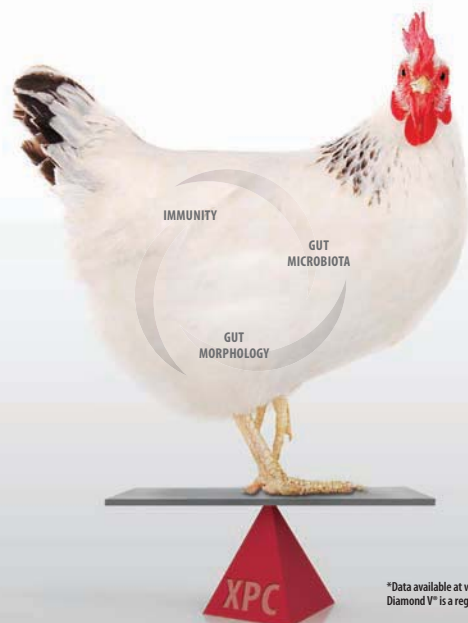
TA: The American Humane Association Certified Farm Animal Welfare program represents mainstream consumers and is based on choice and trust. We believe that establishing realistic evidence-based standards by panels of experienced independent scientists, coupled with an audit program implemented by trained personnel, serve the best interests of the stakeholders, industry, consumers, retailers and, most importantly, of animals.

EI: Thank you, Tim.

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2011 Midwest Poultry Federation Convention preview

Workshops, trade show focus on the egg industry Simon M. Shane

The 2011 Midwest Poultry Federation Convention will take place March 16-17 at the Saint Paul, Minn., River-Center. The annual "Midwest" is a must-attend event as it is generally acknowledged to be the most informative program for egg producers. Attendees also benefit from collegial interaction and the trade show focusing on the egg industry.

Pre-convention activities include the North Central Avian Disease Conference which will be held on Monday and Tuesday preceding the Convention.

The Pre-show Nutrition Symposium, organized by Dr. Sheila E. Scheileler of the University of Nebraska, will take place on Tues-



Midwest Poultry Federation Convention
Phone: +1.763.682.2171, E-mail: info@midwestpoultry.com
www.midwestpoultry.com

The annual Midwest Poultry Federation Convention is generally acknowledged to be the most informative program for egg producers.

day, March 15, and will include an update on DDGS in poultry diets, the application of enzymes and testing of poultry feed for mycotoxins.

The Egg Production Workshop will take place on Wednesday, March 16, during the morning session and will include presentations on fly and rodent control, interpreting ELISA antibody assays and vaccination against SE.

The Simmering Issues Workshop organized by Dr. Ken Koelkebeck of the University of Illinois will concentrate on the recent SE egg recall. Speakers will address communication and legal aspects in addition to a perspective from a major Midwest producer.

The Pullet and Layer Health Workshop will again address important topics relating to SE. These will include comments from an FDA representative, rodent control and an update on SE vaccination.

The concurrent Trade Show will include almost 200 exhibitors covering the full spectrum of equipment, pharmaceuticals, biologics, services, chemicals, feed additives and egg production strains.

The layout of the exhibit hall, the information provided by technical representatives of the various suppliers will contribute to a valuable learning experience relating to new technology, equipment design and production techniques. **EI**

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Industry returning to traditional seasonal prices

Decreased demand coupled with a rising price denotes a decline in supply attributed to depletion and diversion

Maro Ibarburu, program manager for the Egg Industry Center located at Iowa State, released the November-December Statistical Report on January 9, 2011, which was prepared in collaboration with Don Bell of the University of California at Riverside.

It is evident that the industry is returning to traditional seasonal prices with the post-Christmas decline evident. The volume of shell eggs reaching the market may still be restrained by premature depletion of flocks and diversion as a result of 45-week and post-molt confirmation of infection with SE in individual flocks in some operations.

The table below highlights the pattern in commodity egg sales during the four months following the SE recall. The values reflect the monthly algebraic means for commodity egg sales derived from weekly IRI reports compared with the corresponding months of 2009. The pattern of decreased demand coupled with a rising price denotes a decline in supply attributed to depletion and diversion as noted in previous *Egg Industry* reviews of monthly statistical reports.

Month (2009)	Differential in Sales 2009-2010
August	-11.4%
September	- 4.0%
October.....	- 2.0%
November.....	- 2.0%

The current report as distributed by the EIC is summarized for readers of *Egg Industry*. The major trends over the past month are noted in the statistics and comments below. It is emphasized that data generated using models which are appropriate in times of relative sta-

bility lose predictive accuracy during short-term market turmoil.

✓The U.S. estimated (6-Region) cost of production for December 2010 was 69.4 cents per dozen ex-farm, which is 1.7 cents per dozen or 2.5% more than in November. The range in production cost among regions extended from 65.5 cents per dozen in the Midwest to 72.9 cents per dozen in the South East. This value was fractionally higher than for California at 72.8 cents per dozen.

✓The margin represented by “income minus cost” for December attained 23.1 cents per dozen compared to 34.3 cents per dozen in November and only break even in October. For 2010 the average algebraic margin attained 9.4 cents per dozen compared to 6.7 cents per dozen in 2009.

✓In evaluating the breakeven margin for December it was noted that feed cost was 44.4 cents per dozen, with pullet depreciation at 9.8 cents per dozen and other fixed and variable costs amounting to 14.7 cents per dozen, applying the standard EIC cost factors. These values other than the feed and pullet categories remained unchanged through the first ten months of 2010. It is evident that escalation in ingredient prices will be the most significant challenge to attaining profitability in 2011.

✓Producers attained a farm profit of 23.1 cents per dozen corresponding to 65.8 cents per hen housed based on December costs and revenue,

compared to 34.4 cents per dozen in November, a breakeven situation in October and a loss of 32.7 cents per bird in September. For 2010, ex-farm profit was 9.4 cents per dozen or 232.6 cents per hen.

✓The UB simple average producer price for six U.S. regions, assuming 80% large grade eggs, was 96.5 cents per dozen for December compared to

Examining events of the SE recall
www.WATTAgNet.com/18074.html

100.2 cents per dozen in November 2010. The 2010 cumulative simple average UB price was 70.2 cents per dozen. The range over the six reported regions was 95.1 cents per dozen for California to 99.8 cents per dozen for the South Central Region.

✓The USDA-AMS determined an ex-farm price of 106.7 cents per dozen for December compared to 109.3 cents per dozen in November. Corresponding warehouse/distribution center and store delivery prices were 124.8 cents per dozen and 130.3 cents per dozen respectively, unchanged from November. The farm-to-store spread was 23.67 cents per dozen which was appreciably higher than the value of 20.95 cents per dozen in November. The average ex-farm price for 2010 was 76.8 cents per dozen, which is 6.2% higher than in 2009. The farm-to-store delivery spread of 22.5 cents per dozen for 2010 was 1.7% lower than the corresponding value in 2009.

- ✓ In reviewing retail prices for table eggs, the Bureau of Labor Statistics and the Department of Commerce estimated a November average of 167.5 cents per dozen, 15.0% lower than the November 2010 value of 145.6 cents per dozen. The simple average retail egg price for the first eleven months of 2010 was 164.8 cents per dozen.
- ✓ The Large-to-Medium grade white-egg price spread over six regions was 40.5 cents per dozen in December compared to 36.1 cents per dozen in November with an average spread of 22.8 cents per dozen during 2010. Regional spreads in December ranged from 37.1 cents per dozen in the North East to 43.5 cents per dozen in the South Central Region. The average spread for the six regions was 12.2% comparing November and December 2010. In contrast, an exaggerated value of 78.7% was recorded for the October-November comparison.
- ✓ During December 2010, layer feed averaged \$258.40 per ton, which is 19.1% higher than the \$216.60 per ton average based on six regions during 2010. During December the price range among regions was \$238.80 per ton in the Midwest rising to \$274.40 per ton in California. The differential of \$35.60 per ton is equivalent to approximately 6.3 cents per dozen applying realistic industry production parameters.
- ✓ During 2010, the volume of commercial-egg strain eggs in incubators remained almost constant at an average of 38.73 million (compared with 36.57 million in 2009) with a range of 33.4 million in August to 42.9 million in April 2010.
- ✓ Straight-run hatch for November attained 39.0 million with an average for the first eleven months of 2010 at 41.17 million.
- ✓ Projections for pullets to be housed in future months based on the five months-previous hatch and incorporating a 5% mortality factor, includes a range in the increase of placements from 15.75 million pullets in April to 21.44 million pullets in September 2010. The 12-month average of 18.21 million pullets per month for 2010 is

5.5% greater (1.0 million pullets) than the 12-month average of 17.26 million per month for 2009. The 2006 to 2010 monthly average was 15.96 million pullets placed each month. April 2011 placement will be 17.6 million, which is 1.1% higher than the 3-month average of 17.8 million for the first quarter of 2011 and 17.2 million for the corresponding quarter in 2010.

- ✓ For November 2010, the USDA-NASS estimated the national flock at 281.1 million hens, 2.1 million less than in October 2010. Applying the University of California model based on USDA-NASS data for chickens and eggs, it is estimated that the January 2011 flock will attain 282.9 million hens, rising to 292.6 million in December 2011.

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| Industry returning to traditional seasonal prices |

✓ As at the end of November 2010, 21.7% of the national flock was over 72 weeks of age. The seasonal pattern of an increase in molted flocks from October through December appears to be different during the third quarter of 2010. In 2009 the proportion of second-cycle hens in the national flock was 26.2% (31.1% in 2009) compared to a 21.4% average for October and November of 2010. This may reflect either the disinclination to molt flocks based on potential return from prevailing egg prices and feed cost. An alternative may be that some flocks are identified as SE positive immediately prior to molt or at resumption of production resulting in depletion, reducing the number of older hens. For the eleven months of 2010 an average of

account any depleted flocks which are buried, rendered or shipped to Canada.

✓ Six regions reported a simple average of 24% molted hens in December, down 2% from November 2010. The actual proportion of molted hens in the U.S. varies widely, from 9.5% in the North East to 34% in California. An average of 23.9% molted hens was recorded in the six-regions during 2010. Differences among regions are attributed to production cost, revenue for eggs and realization value for spent hens.

✓ According to projections developed by the University of California, the most recent estimate of the national table-egg flock for January 2011 is 282.9 million hens following

▶ ***It is estimated that the January 2011 flock will attain 282.9 million hens, rising to 292.6 million in December 2011.***

24.5% of the national flock had been molted compared to 23.7% during the corresponding period in 2009.

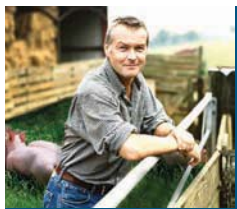
✓ During November 2010, USDA-FSIS data indicated that 4.0 million hens were processed compared to an eleven-month average of 5.6 million hens. The quantity processed in November represents a restoration to the more limited pre-Christmas volume. The FSIS value does not take into

an actual value of 283.2 million in December 2010. This number is expected to increase steadily to 292.6 million by the end of the year. Given current surveillance programs as mandated by the FDA, national flock size could be trimmed further by depletion following evidence of SE infection or if consumer demand is depressed following any additional recalls. Compensatory increases in flock size by retention of known SE-negative flocks may occur in regions or for specialty products, subject to available capacity including re-caging. Although UB prices during mid-November through early December reverted to pre-recall projections developed mid-year, a depression in price would be expected following any additional identifications of SE. A decline in consumption consequential to adverse publicity would inevitably result in a decrease in hen numbers since flocks will be depleted at a rate faster than projected.

✓ The University of California projected a UB Large Midwest price of 130.6 cents/dozen for January 2011. The latest projection for March 2011 is 129.4 cents per dozen, contingent on current trends in flock depletion and consumer demand. It is reiterated that each 10-cent-per-dozen difference between forecast and actual UB price is equivalent to \$30 million per month over 165 million hens producing generic eggs.

✓ In November, the top six egg-producing states with 158.57 million hens (157.7 million in October) represented 57.3% of the total of 276.6 million hens in flocks above 30,000 hens as recorded by the USDA. In descending order these states are Iowa (18.7% of total), Ohio (10.1%), Indiana (8.1%), Pennsylvania (8.4%), California (7.0%), and Texas (5.1%). States reporting to the USDA-NASS represent 98.4% of all hens producing table eggs.

✓ The rate of lay for the first eleven months of 2010 attained 76.2%. This is fractionally higher than in 2009 during which an average of 75.7% was recorded. Average rate of lay is a function of weighted flock age and is also influenced by climatic conditions.



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✓During November 2010, 5,491 million cases of eggs were broken under federal inspection, which is 6.0% lower than in October but 9% more than in November 2009. For the first eleven months of 2010, egg breaking was up by 3.9% over the corresponding period in 2009. For the year to date, 31.9% of the 198.43 million cases produced were broken compared to 30.8% for the entire year of 2009. It is noted that on a year-to-year basis the proportion of eggs broken has shown a steady decline from the 2005 high of 35.1% to a projected value of 30% for 2010.

✓The revised egg consumption value for 2010 is projected by the USDA-ERS to be 246.6 per capita, about 0.45% lower than the 247.7 eggs per capita recorded in 2009. Over the past seven years the highest per capita consumption of 257.8 eggs occurred in 2006. The efforts of the American Egg Board and the UEP in mounting a positive campaign promoting egg consumption and a less aggressive media initiative by the FDA contributed to attaining a projected value of 62.7 eggs per capita for the fourth

quarter although consumption was markedly depressed in September and part of October.

✓During October 2010 the USDA-FAS recorded exports of 268,000 cases of shell eggs contributing to a ten-month total of 1,997,000 cases representing approximately 1.5% of U.S. production. Ma-

Escalation in ingredient prices will be the most significant challenge to attaining profitability in 2011.

major importers during 2010 to date were Hong Kong/PRC at 40.7% and Canada taking 24.9% of shipments. Shell eggs represented 31.2% of total exports to date.

✓Combined exports of shell eggs and egg products expressed as “shell-egg equivalents” attained 5,883,100 cases for the first ten months of 2010, representing 3.8% of U.S. production. The cumulative export of egg products was 24% higher in 2010 to date compared to the corresponding period in 2009. Major importers during 2010 were Japan (23.1%), Germany (19.9%), Canada (12.1%), S. Korea (6.1%) and Mexico (4.5%).

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Online forum to address challenges of feeding the globe

The *WATT Online Animal Forum: Feeding the Globe* is designed to help animal agriculture executives meet the challenges of feeding the world's growing population.



This online event — scheduled for Apr. 6 — offers a valuable mix of live webinars, networking opportunities and information on products and services from major industry suppliers.

Animal agriculture has enormous opportunities for global expansion over the next 30 to 40 years. United Nations projections indicate that the world population will grow from a current level of about 7 billion to exceed 9 billion by 2050, meaning that there will be 30% more mouths to feed. For company executives in the poultry and livestock sectors and their technical advisers,

the question will be how to position the business to take advantage of the projected market growth.

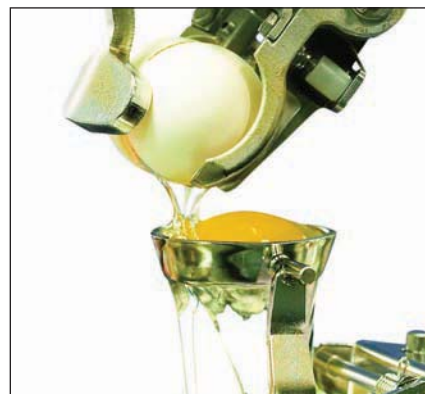
“Everyone involved in the operation and strategic planning of enterprises in meat and eggs needs to be well informed about the key challenges that we will all face in feeding another 2 billion people worldwide,” says Peter Best, consulting editor for the international agrifood information services of WATT. “That is why WATT is organizing this special online forum.”

The forum, which will include a range of speakers from different disciplines and geographic areas, is free to attend and can be accessed through the Internet from the comfort of your home or office. Attendees may enter and leave the forum as their schedules allow.

Visit www.wattevents.com for details about the *WATT Online Animal Forum: Feeding the Globe*, including how to register. The forum, on Apr. 6, will run from

0800 to 1700 CST (1400 to 2300 GMT).

Moba incorporates egg processing activities of OvoPro



Starting from the International Poultry Expo in Atlanta in Jan. 2011, Moba will incorporate the egg processing activities of sister company OvoPro. Two years ago, OvoPro started as a sister company of Moba

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Originally broadcast on December 7, 2010, the “Mycotoxin Management Roundtable” moderated by Gary Thornton, Content Director for WATT PoultryUSA, discussed important mycotoxin issues such as:

- Sampling
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- Mycotoxin symptoms
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with the aim to supply solutions for the egg processing industry.

To enable future expansion and serve customers better, the logical next step is to integrate OvoPro activities into the mature Moba organization. By doing so, Moba will become a global partner for the grading, packing and processing of eggs.

The worldwide service and sales network as well as the research and development departments in Barneveld, Netherlands, and in Farmington Hills, Mich., will become vital links in future processing activities.

Passing of Dr. Stephen Hitchner

Dr. Steve Hitchner, a distinguished poultry production and disease specialist, died on Jan. 1, 2011 at his home in Salisbury, Mont., at the age of 94.

In his long and productive career, Dr. Hitchner served in the U.S. Army during WWII followed by research and teaching positions at Virginia Polytechnic University and the University of Massachusetts. He was a pioneer of the poultry biologics industry, developing vaccines, and was a founding member of Ameri-

can Scientific Laboratories in Madison, Wis., and subsequently L & M Laboratories on the Eastern Shore. He served as chairman of the Department of Avian Diseases at Cornell University from 1966 through 1981.

Dr. Hitchner obtained a Baccalaureate degree from Rutgers University and his VMD from the University of Pennsylvania. He was an Honorary Diplomat of the American College of Poultry Veterinarians. His many achievements included the isolation, propagation and

commercialization of a mild Newcastle disease strain which bears his name and which formed ND prevention programs worldwide.

He will be remembered for his modesty, willingness to help producers and students and for his contributions to his community and church. He is survived by Marina, his wife of 67 years, and four children.

Steve will be sorely missed by his colleagues in the veterinary profession and by the poultry industry. **EI**

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➤ PRODUCTNEWS

Robotics ADAM RAP robotic system



RNT Robotics of Ontario Canada has introduced a sophisticated ADAM RAP robotic system that will respond to voice messages and can also generate sounds and tones relating to function. Although the company does not market robotics modules for egg packing plants, it is possible that adaptation of audio interaction may provide benefits when robotic technology is used more extensively in the industry.

www.rmtrobotics.com

IDEXX Laboratories Inc. FlockChek

IDEXX Laboratories Inc. offers FlockChek avian influenza multiS-screen antibody test kit. FlockChek detects avian influenza antibodies across multiple species with 99.7 percent specificity at 13 days post infection, according to IDEXX. The test has ready-to-use reagents, room temperature processing and is suitable for automated processing, the company says.

www.idexx.com

Poultry Management Systems Inc. NOAH IV

Poultry Management Systems Inc. offers NOAH IV, Natural On-Line Animal Housing. This poultry house control system is designed to help manage individual flocks and make on-farm flock compar-

isons with data that can be transferred to spreadsheets or accounting software, the



company says. The NOAH system allows for selection between central or in-house controls, three forms of remote terminals

and different user profile logs. The system can be customized to set light schedules by flock age, monitor layer mortality or monitor egg production by row, among other custom options, according to the company.

www.pmsi.cc/

➤ MARKETPLACE

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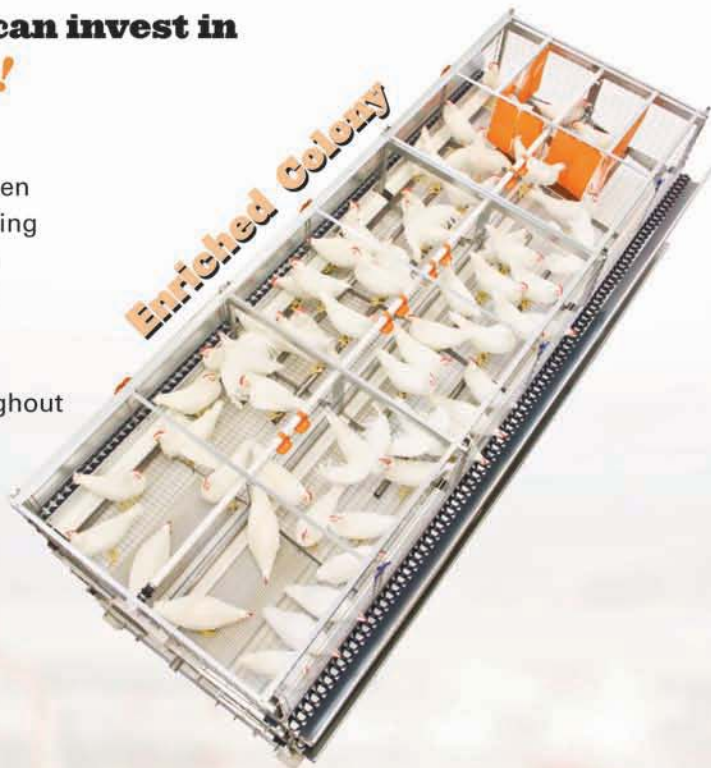


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