

Egg Industry

News for the Egg Industry Worldwide

WATT

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2008 Egg Industry Survey:

Producers expect drop in egg prices in 2009

Supply and demand, profits and welfare rank as top issues of concern.

TOP COMPANY RANKINGS (LAYERS IN PRODUCTION 12/31/2008)

Company	total layers	Company	total layers	Company	total layers	Company	total layers
Cal-Maine Foods.....	28,600,000	Hickman's Egg Ranch.....	4,100,000	Pilgrim's Pride Corp.....	2,070,000	Ritewood Egg Farm	1,300,000
Rose Acre Farms.....	21,600,000	Maxim Egg Farm.....	4,000,000	Esbenshade Farms	2,000,000	Konos Inc.	1,250,000
Sparboe Summit Farms.....	12,000,000	Wabash Valley Produce.....	4,000,000	Gemperle Enterprises	2,000,000	Pine Hill Egg Ranch.....	1,250,000
DeCoster Egg Farms.....	11,800,000	Weaver Brothers	4,000,000	Willamette Egg Farms.....	2,000,000	L & R Farms	1,193,000
Moark LLC.....	11,600,000	Dutchland Farms	3,500,000	Demler Enterprises.....	1,900,000	Pearl Valley Eggs	1,105,000
Michael Foods	11,200,000	National Food.....	3,500,000	Dixie Egg/Foodonics/		Dorothy Egg Fram.....	1,100,000
Daybreak Foods	9,200,000	Sunrise Farms Inc.....	3,500,000	United Egg Marketers	1,800,000	Morning Fresh Farms	1,100,000
Ohio Fresh Eggs.....	7,200,000	Creighton Bros.....	3,064,000	Sunrise Acres.....	1,660,000	Wilcox Farms	1,100,000
Fort Recovery Equity.....	6,200,000	Kreider Poultry Farms.....	3,000,000	J.S. West.....	1,648,500	Dakota Layers Coop.....	1,000,000
Midwest Poultry Services.....	6,000,000	Mahard Egg Farms	2,800,000	Radlo Foods		Sioux County Egg Farms.....	1,000,000
Rembrandt Enterprises.....	5,600,000	Valley Fresh Foods.....	2,500,000	(Mountain Hollow Farms).....	1,600,000	Sunrise Farms LLC.....	1,000,000
ISE America	5,537,000	Braswell Foods	2,300,000	Berne Highway Hatchery	1,500,000	SKS Enterprises.....	800,000
Hillandale Farms of PA	5,500,000	RW Sauder.....	2,300,000	Hemmelgarn & Sons.....	1,412,800	Egg Innovations	650,000
Center Fresh Egg Farms	5,300,000	Hamilton Farm Bureau.....	2,200,000	Cooper Farms	1,400,000	Rindler Poultry	600,000
Herbruck's Poultry Ranch.....	5,300,000	LaValle Egg Farms	2,100,000	Kreher Farms.....	1,340,000	Nature Pure LLC.....	210,000
Fremont Farms of IA.....	5,200,000	S & R Egg Farms.....	2,100,000	Delta Egg Farms	1,300,000	Total.....	245,090,300

By Dr. Simon Shane

This year *Egg Industry* expanded the range of questions and solicited responses only from producers. We thank the more than 50% of those who responded. Questionnaires were processed by a disinterested aide, who entered values into a database with no identification as to origin.

The database was processed by a consulting statistician who developed summary tables and confirmed the validity of the responses. Analysis did not show any bias attributable to self-selection, non-response and withholding of information.

Survey information was supplemented by interviews with producers and

allied industry contacts, generating an updated rank-order of companies.

Highlights of the 2008 survey are summarized in a series of charts:

The U.S. industry is largely generic in market orientation (FIGURE 1 – Shell Egg Production Distribution).

Approximately 60% of shell eggs are

sold in supermarkets; 20% to the institutional market (FIGURE 2 – Shell Egg Market Breakdown).

In-line breaking represents twice the volume of off-line breaking, consistent with the production costs and yields from alternative systems.

The volume of consumer-packed

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• Cage floor



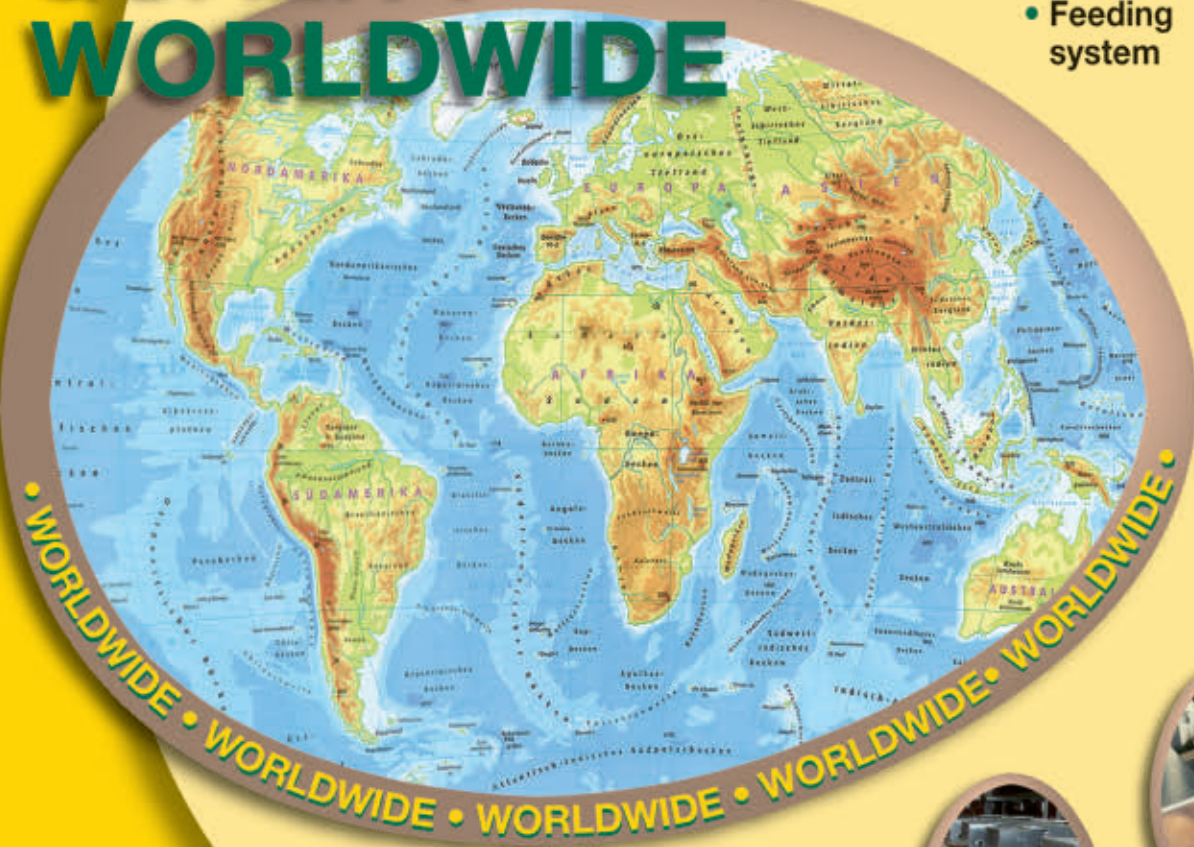
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• Egg collecting system



• Manure drying system



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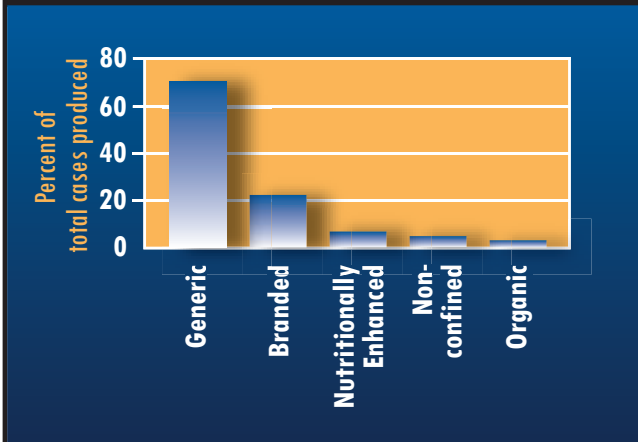


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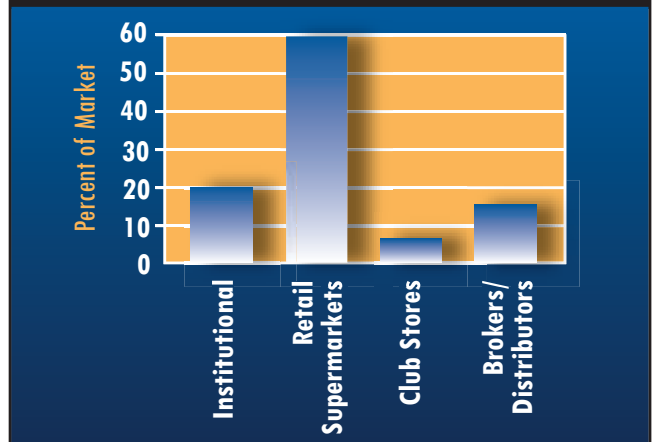


FIGURE 1: SHELL EGG PRODUCTION DISTRIBUTION



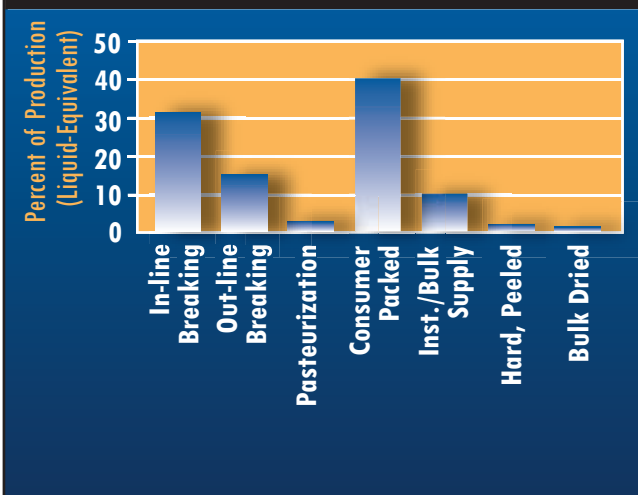
The U.S. industry is predominately generic.

FIGURE 2: SHELL EGG MARKET BREAKDOWN



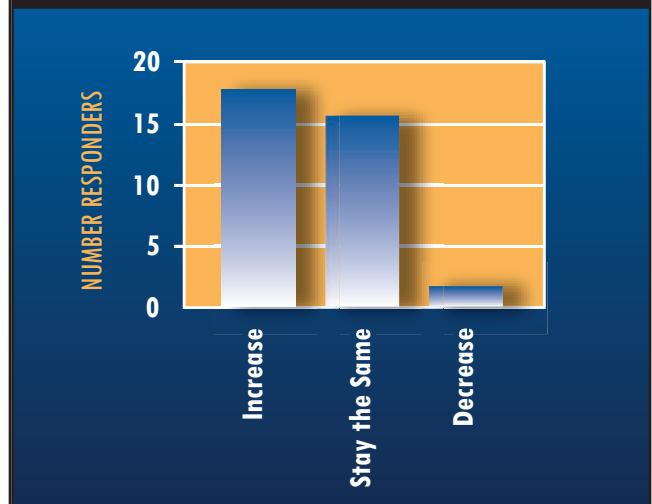
Supermarkets sell about 60% of shell eggs.

FIGURE 3: NON-SHELL EGG PRODUCTION



Consumer-packed pasteurized products far ahead.

FIGURE 4: PREDICTED CHANGE IN HEN POPULATION



Most anticipate no change in hen numbers.

pasteurized egg products among the respondents is four times greater than institutional and bulk liquid egg (FIGURE 3 – Non-shell Egg Production).

Among the respondents, 45% said there would be no significant change in hen numbers; 51% anticipated an increase. Only 3% thought that a decrease in hen numbers was likely

(FIGURE 4 – Mean Predicted Changes in Hen Population).

Generally, our respondents expect 2009 prices to decrease. The expectation for six categories of shell eggs and products is shown in FIGURE 5 – Anticipated 2009 Prices.

Reviewing items of concern, respondents ranked supply and demand, balance (profit) and welfare as most important.

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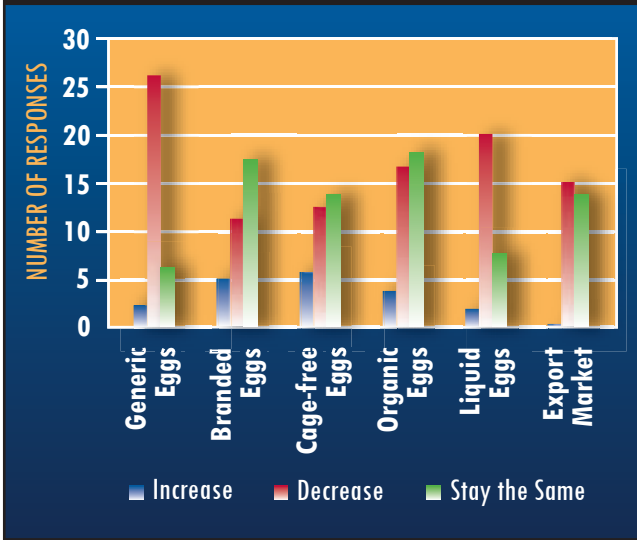
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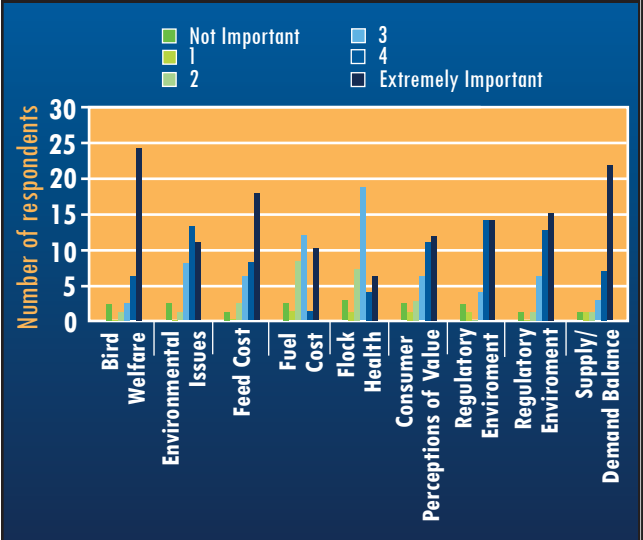


FIGURE 5: ANTICIPATED 2009 PRICES



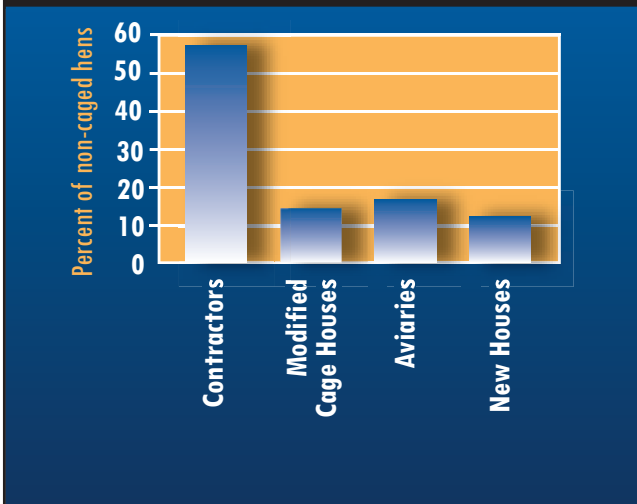
Decrease in prices anticipated.

FIGURE 6: IMPACTS OF VARIOUS FACTORS



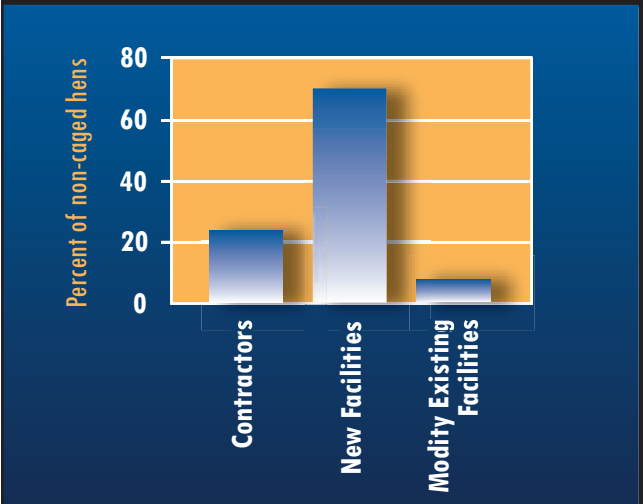
Feed costs, regulatory environment rank high.

FIGURE 7: 2008 NON-CAGED HOUSING



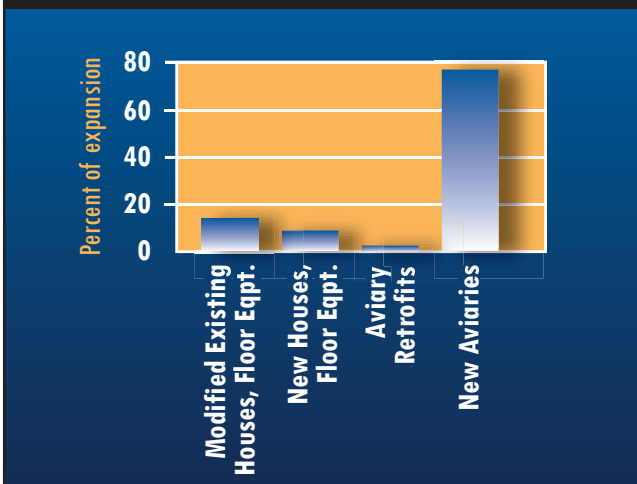
Contractors housed 60% of non-caged hens.

FIGURE 8: 2009 NON-CAGED HOUSING



New facility investments expected in 2009.

FIGURE 9: 2009 NON-CAGED EXPANSION



Feed cost and the regulatory environment ranked highly. Packaging and fuel costs were considered to be of lesser impact (FIGURE 6 – Impact of Various Factors).

Respondents indicated that 638,000 hens would be added in 2009, with 80% in new buildings and the remainder in re-caged houses. In 2008, respondents reported placing 84% of 465,000 hens in new houses.

In 2008, 60% of non-caged housing was with contractors (FIGURE 7 – 2008 Non-caged Housing). In 2009, expansion will be primarily in new company facilities (FIGURE 8 - 2009 Non-caged Housing).

Aviaries in new houses represent the most important system for expansion of non-cage housing in 2009 (FIGURE 9 – 2009 Non-caged expansion).

This year's expansion to be seen in aviaries. E

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Jim Sumner, USAPEEC: Working tirelessly to promote exports

Jim Sumner has served as president of the USA Poultry & Egg Export Council (USAPEEC) for the past 19 years. He is a long-standing member of either the USDA Agriculture Technical Advisory Committee or the Agriculture Policy Advisory Committee which are instrumental in advancing U.S. poultry industry interests in international trade negotiations.

Jim was elected as the first president of the International Poultry Council, which he helped found in 2006. He serves as the Export Advisor to the American Egg Board and is Chairman of the Trade and Executive Committees of the International Egg Commission. Sumner holds a degree in journalism from Southern Illinois University and has undertaken post graduate work in public relations. The USAPEEC is a non-profit organization representing 210 poultry processing companies, traders and affiliated organizations involved in exports. The Council receives funds from the Foreign Agriculture Service of the USDA, State and National Industry Commodity associations including a modest but welcome contribution from the AEB.

Jim Sumner set aside time from his demanding travel and meeting schedule for *Egg Industry* to review aspects of export promotion.

Egg Industry: Jim, please share some of the export successes achieved by USAPEEC over the past few years.

Jim Sumner: 2007 was an excellent year for shell egg exports due in part to a non-recurring demand from the Middle East and the EU. We are, however, currently maintaining a steady volume for egg products in line with traditional volumes.

Over a year ago, we brought on board our own economist, Dr. Renan Zhuang, who calculates that export activities, which represent 3% of total U.S. shell egg equivalents, are

contributing materially to industry earnings.

EI: What barriers do we face in expanding exports?

JS: The cost of transport—both from inland plants of origin to our coasts—and sea freight have been extremely high. The U.S. dollar is strengthening against other currencies, which also impairs our ability to compete. A global economic crisis has reduced demand in many of the countries to which we traditionally export. But as bad as the economic and feed grain situation is in the U.S., it's usually even worse outside the U.S., giving us new market opportunities around the world.

EI: How is USAPEEC addressing these problems?

JS: We are constantly searching for new market opportunities and are working hard to maintain traditional importers. We have recently staged promotional activities in Hong Kong and Japan. Our emphasis will continue to be on egg products, especially dried eggs which do not require refrigeration.

Starting about a year ago we began incurring tremendous problems obtaining refrigerated containers for shell eggs. With the down-turn in global trade and improved logistics, the availability of refrigerated containers is now much less of an issue.



I'm convinced that we will continue to make incremental improvements in volume across the board with the largest growth area in dried egg components.

Paradoxically, contamination of the food chain with melamine in Southeast Asia has resulted in renewed appreciation for the inherent quality and safety of U.S. poultry meat and eggs. An unfortunate result of the recent revelations has been the imposition of stricter regulations and requirement for assays to confirm freedom from adulterants.

EI: Are there any new markets opening up?

JS: Mexico has emerged as a significant consumer of further-processed egg products. Our local representative



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Dr. Ivan Alvarado, Dr. Mariano Salem with customers and Dr. Andy McRee with customer.

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Jose Manuel Sampeiro (our Señor Huevo!) has generated demand in a number of markets in our southern neighbor. We have commenced exporting pasteurized in-shell eggs since conventional product cannot be exported to Mexico, which, like many countries, sees no need in maintaining a cold chain for shell eggs.

EI: Are there any technical restraints to improving quality of shell eggs exports?

JS: The industry should carefully evaluate the specifications for egg export boxes since overseas shipment involves many points of handling, requiring more substantial protection than for domestic product.

EI: Are there any other potential markets for shell eggs or products?

JS: We are showing increases in shipments of shell eggs into the Caribbean Basin. Cuba may again emerge as an important market, along with other countries which are dependent on importing feed grains which includes most of the Caribbean.

Canada imports U.S. shell eggs to balance demand. It is inevitable that their quota system which artificially restricts domestic production and imports of agricultural products will ultimately be eliminated creating opportunities for U.S. exporters and possibly joint ventures.

EI: How do you view the future of exports of shell eggs and products?

JS: I'm convinced that we will continue to make incremental improvements in volume across the board with the largest growth area in dried egg components. Cumulative exports of egg products for the first seven months of 2008 attained \$51.7 million, which is a 20% increase over the first seven months of 2007.

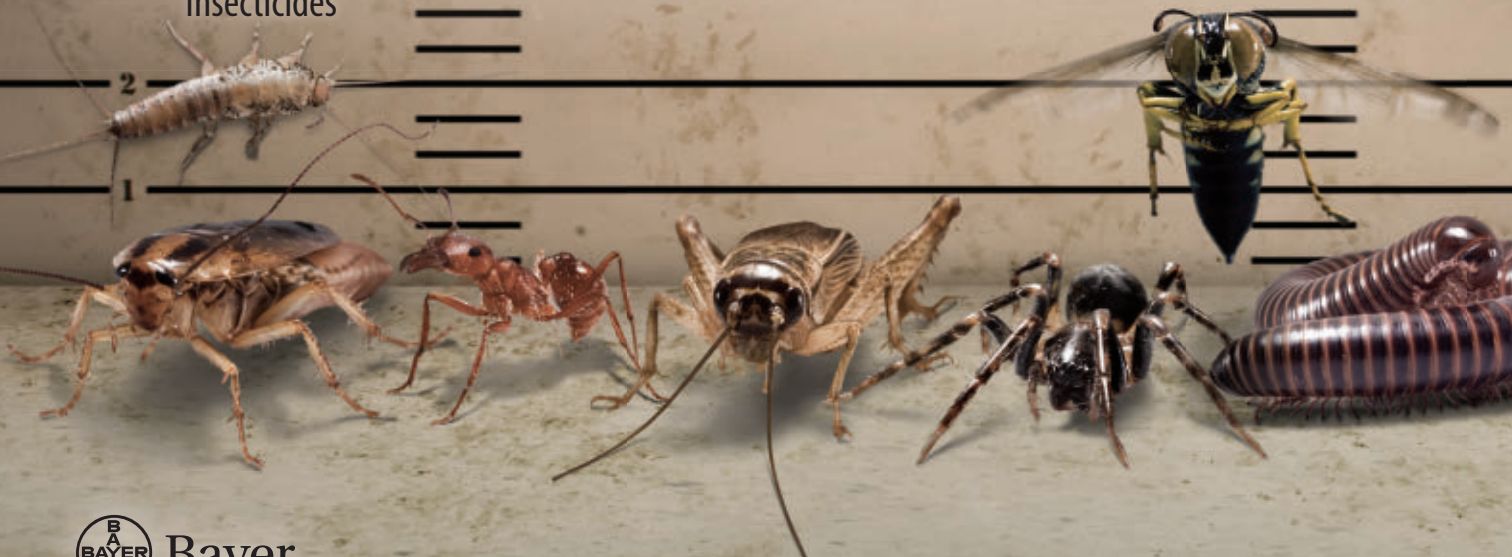
Japan increased purchases and it is expected that a similar trend will be seen in 2009 based on quality and safety considerations. Dried egg product is used extensively in Japan for noodles, mayonnaise and for traditional dishes.

Germany, Mexico and Denmark also increased imports which is a gratifying trend. It is possible that the U.S. industry may become more export-oriented.

As with many exported products, it is necessary to supply in accordance with customers' specifications. It has been suggested that we may consider producing brown eggs from caged hens since consumers in many of our importing nations discriminate against white shells. If we are to serve certain Moslem markets which continue to grow throughout the world, it may be necessary to feed all-vegetable diets to conform to Halal requirements; that is a decision our egg producers will need to make. Certain markets also require jet

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printing or etching of shells using languages and codes.

EI: USAPEEC maintains offices in 13 foreign countries and your Georgia-based staff is constantly traveling to promotional events, international meetings and for consultation with officials in importing countries. Is the Council adequately funded?

JS: We are supported in part by our members and by various federal agencies and from state and national industry association grants. We receive a modest contribution from the American Egg Board (AEB) which is derived from check-off payments.


More information

Stay abreast of USAPEEC's contributions to the egg export industry at

www.usapeec.org

Unfortunately, many of the grassroots producers who are sometimes polled on the use of promotion funds are frequently unaware of the direct contribution made by USAPEEC to export promotion and the beneficial effect this has on all producers, irrespective of their participation in exports. **EI**

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Management of floor-housed flocks



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Professor Dietmar Flock, an experienced geneticist and poultry production specialist, recently published a review entitled “The Adaptability of Laying Hens in Non-Caged Environments,” in *Lohmann Information*. Through his distinguished and productive career, Dr. Flock has been affiliated with the Lohmann Breeding Company in Germany and Hy-Line International in the United States.

Caged systems lower losses

Comparisons between caged and floor systems in German random-sample tests demonstrated higher mortality, especially due to cannibalism, lower hen-housed egg production and correspondingly inferior feed conversion in floor-housed hens.

In five trials, hens which had been beak-trimmed showed 2.4% losses due to cannibalism. In contrast, floor hens subjected to the same conditions but without beak-treatment showed a six-fold increase in losses. The performance of floor-housed flocks may also be apparently lower than in cages due to loss of eggs in litter and through slats.

How to optimize floor housing

Based on experience in Europe and drawing on his extensive contacts with universities, research institutions and *Lohmann Breeding Company*, Professor Flock prepared a series of guidelines which should be followed to optimize production from floor housing:

- Rearing flocks should be adequately protected by vaccination against diseases to which they will be exposed.
- Diets should contribute to attaining standard weight and uniformity in excess of 80% of the flock.
- Perches should be available for rearing flocks from one week of age onwards to encourage the flock to use the cube volume of the house and not be restricted to slats or litter.
- Pullets should be transferred at 14 weeks of age. This is two weeks before the onset of a critical period extending from 16 weeks to 18 weeks, when development of the reproductive tract occurs as a result of light-induced activity of the hormonal system. Early transfer also allows pullets to adapt to the laying environment including the location of nests and feeding systems.
- Special attention should be paid to both intensity and duration of lighting. Gradual dimming of lights at the end of the day is beneficial with respect to the calmness of the flock. Lighting systems should emit a broad spectrum corresponding to natural daylight.
- Litter quality is a significant factor in both flock health and shell quality. Adequate ventilation is necessary and special precautions should be taken to prevent saturation of litter.
- Feed quality appears to be equally critical for floor-housed flocks as with caged hens. Balancing amino acids and assuring adequate availability of nutrients is important with organic feeds
- Frequent inspection of flocks is required to detect any abnormalities in either behavior or health. Prompt intervention is necessary in the event of a decline in water or feed consumption, a drop in egg production or an increase in morbidity or mortality.

Wide range of mortality

An analysis of 34 commercial flocks on 17 farms in Germany, ranging in size from 500 to 20,000 hens, showed a wide range in mortality on floor systems extending from 13% to 18%, compared to an average of 8% in conventional cages. White-egg hens averaged 89% production compared to 77% for brown-egg strains.

Conclusions from the analyses included:

- ✓ Variability in performance with floor systems has eco-

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floor-housed flocks at

[www.WATTpoultry/
floor-housed.aspx](http://www.WATTpoultry/floor-housed.aspx)

conomic implications,

✓Peak treatment is required to limit cannibalism and feather pecking,

✓Egg quality is adversely affected in floor systems compared to cages, and

✓The lowest performance levels were recorded using free-range housing.

An important conclusion from the analysis was that housing for rearing flocks should correspond to the laying units to which they will be transferred with respect to equipment and lighting.

Floor-systems require more feed/fuel

Data comparing caged and floor-housed flocks clearly demonstrated inferiority in hen-housed egg production, irrespective of strain. More feed and fuel are required to produce the same number of eggs using floor systems. This disparity must be compensated by a price differential to ensure an acceptable return on investment and labor committed to floor production. **EI**

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PAACO trains auditors in poultry welfare standards

Guidelines for floor-housed flocks and standard variances were included in training.

By Sheila E. Scheideler, Ph.D.

Standards established by five industry organizations were part of the 2008 Poultry Welfare Auditor Training and Certification Course organized by the Professional Animal Auditors Organization (PAACO). The program, held in Raleigh, N.C., was developed to train auditors to conduct welfare evaluations to comply with

standards established by:

- ✓The United Egg Processors,
- ✓The National Broiler Council,
- ✓The National Turkey Federation,
- ✓The Food Marketing Institute, and
- ✓The National Council of Chain Restaurants.

This program parallels the Red-Meat Welfare Auditors Training Program

used in the beef and pork industries to satisfy the requirements of the Food Marketing Institute (FMI) and National Council of Chain Restaurants (NCCR).

Production overviews presented

The course was team-taught by specialists in their respective fields. Overviews of broiler, turkey and egg production were presented to familiarize candidates with standard practices in poultry production. Although auditors are not responsible for assessing the validity



Dr. Sheila Scheideler

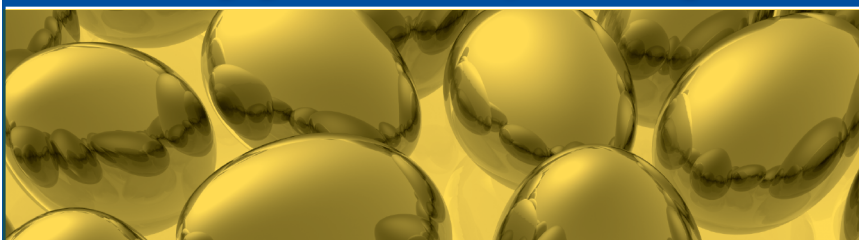
of the standards, they must be able to verify stocking density and evaluate environmental parameters which are specified in the audit forms. The training program emphasized conduct of audits including the approach to subjective evaluation of criteria.

The 2008 program included training on the expanded UEP Animal Husbandry Guidelines which now incorporate floor-housed flocks.

Standard differences reviewed

Differences among audit standards were reviewed. An example of alternative approaches was illustrated by the fact that the UEP audit instrument assigns points for not carrying out beak trimming.

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In contrast, the NBC audit only allows the auditor to assign points for correct beak treatment when performed.

Attendees visited a turkey, broiler or egg production operation to observe protocols including biosecurity and the conduct of an audit. It was evident that a significant part of most of the audits involved review of production records and documentation relating to routine procedures and training.

Certification gaining acceptance

PAACO will extend activities to validating audit standards to ensure that they are practical and relate to improving welfare. Standardization among the various consumer and industry groups is required to ensure consistency and equivalency.

Professional training of auditors to ensure third party audits is conducted with due regard to ethics and diligence, and will encourage acceptance of welfare certification in the food industry

by customers and consumers.

Consumer demands for food products produced standards of welfare that are now accepted by the industry. **EI**

Dr. Sheila Scheideler is a Professor and Extension Poultry Specialist and currently the interim Head of the Department of Animal Science at

the University of Nebraska. She has published on a wide range of topics including management and nutrition since earning her Ph.D. from Iowa State University in 1986. She was the recipient of the PSA Helen Cecil Leadership Award in 2007 and was inducted into the Nebraska Poultry Hall of fame in 2008.

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▶ PRODUCTNEWS

House-shaped heater

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content of fuel into infrared heat which is transferred directly to the floor using large, ribbed emitter surfaces. A spacious combustion chamber and effective burners enhance



efficiency and generate even heat distribution through all burner ports. Adjustable height helps optimize floor coverage.

Agile Mfg. Inc.
www.shenmfg.com

Quail egg packaging



Ovotherm offers a devisable 2x12 quail egg pack with an area for labeling on top. The packs are made in R-PET. The pack was designed to appeal to retailers' gourmet clients. The specialty eggs can be seen through the clear, environmentally safe packs.

Ovotherm International
www.ovootherm.com

Egg counting technology

The EggCam from Big Dutchman pictures, counts and records weight and quality of eggs in the barn. The egg counting system comprises an image processing technology integrated in a sensor. The system checks the eggs for dirt on the surface already in the barn and, at the same time, measures the eggs and assigns them to different weight categories.

Big Dutchman International
www.bigdutchman.de



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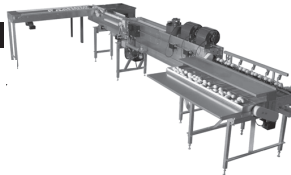
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► EDITORIAL

WITH DR. SIMON SHANE

Annual survey elicits 50% response

This edition of *Egg Industry* includes a summary of the results of the December 2008 survey covering the past year with forecasts for 2009.

The response rate of over 50%, although acceptable for an industry questionnaire, was constrained by concerns over nuisance suits brought against the UEP and individual companies by animal rights activists. It is hoped that the assurance of anonymity, collating values into a common

database and the usefulness of the survey will encourage a higher level of participation in the anticipated December 2009 survey.

It was possible to reproduce the highlights from the survey but interpretation and conclusions are left to the reader.

Egg Industry would be grateful for suggestions and topics to be incorporated into subsequent surveys.

As usual your comments are always welcome.



Simon Shane

Simon
sshane@nc.tr.com

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www.WATTpoultry.com

WATT editors express opinions on industry issues in *The Shane Report* and *The Chicken Wire*.

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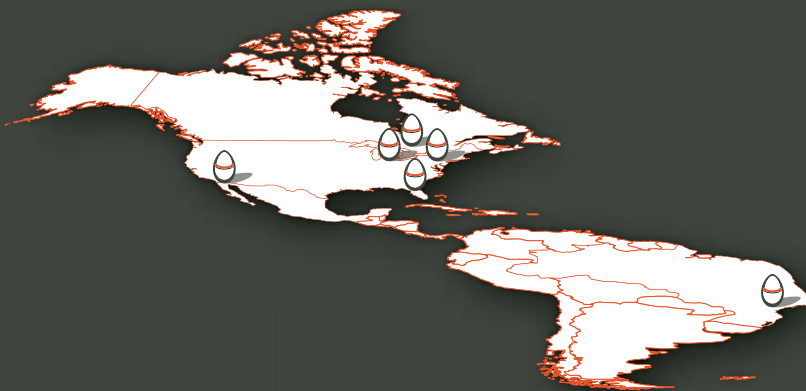
A photograph of the DBK 2000 Precision Beak Trimming machine, which is a specialized piece of equipment on wheels with a red seat and a control panel.

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INDUSTRY NEWS

USDA-ARS crack detector

A recent report on the ARS website (www.ars.usda.gov), documents the achievement of scientists at the Egg Safety and Quality Research Unit and the Quality and Safety Assessment Research Unit at the Richard Russell Center, Athens, Ga.

The teams have developed a test instrument to detect micro cracks in shells. The research projects follows a request from USDA-Agriculture Marketing Service to develop a unit to determine the prevalence of cracks which may not be visible on either candling or using high-frequency analysis crack detectors as installed on commercial egg graders.

The system comprises a chamber in which eggs are subjected to negative pressure and are then scanned with an electronic camera to detect cracks.

Using 1,000 commercial eggs, the system detected 99.4% of cracks with only a 0.3% false positive rate. The sensitivity and specificity of the negative pressure unit exceeds the parameters attained by trained observers.

It is apparently the intention of USDA-AMS to deploy the unit if it can be economically commercialized to assist in grading of eggs. **EI**

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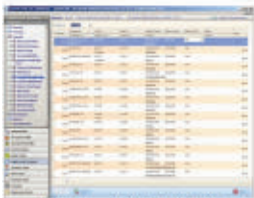
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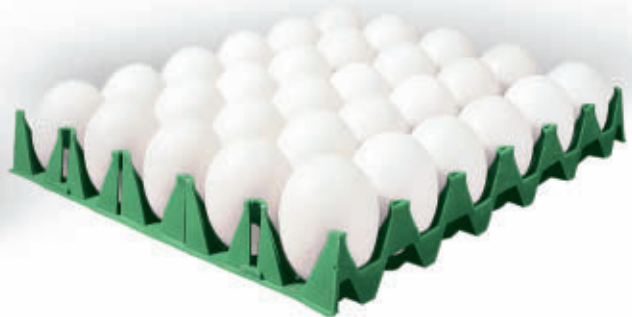
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