

Egg Industry

News for the egg industry worldwide
volume 122 number 2

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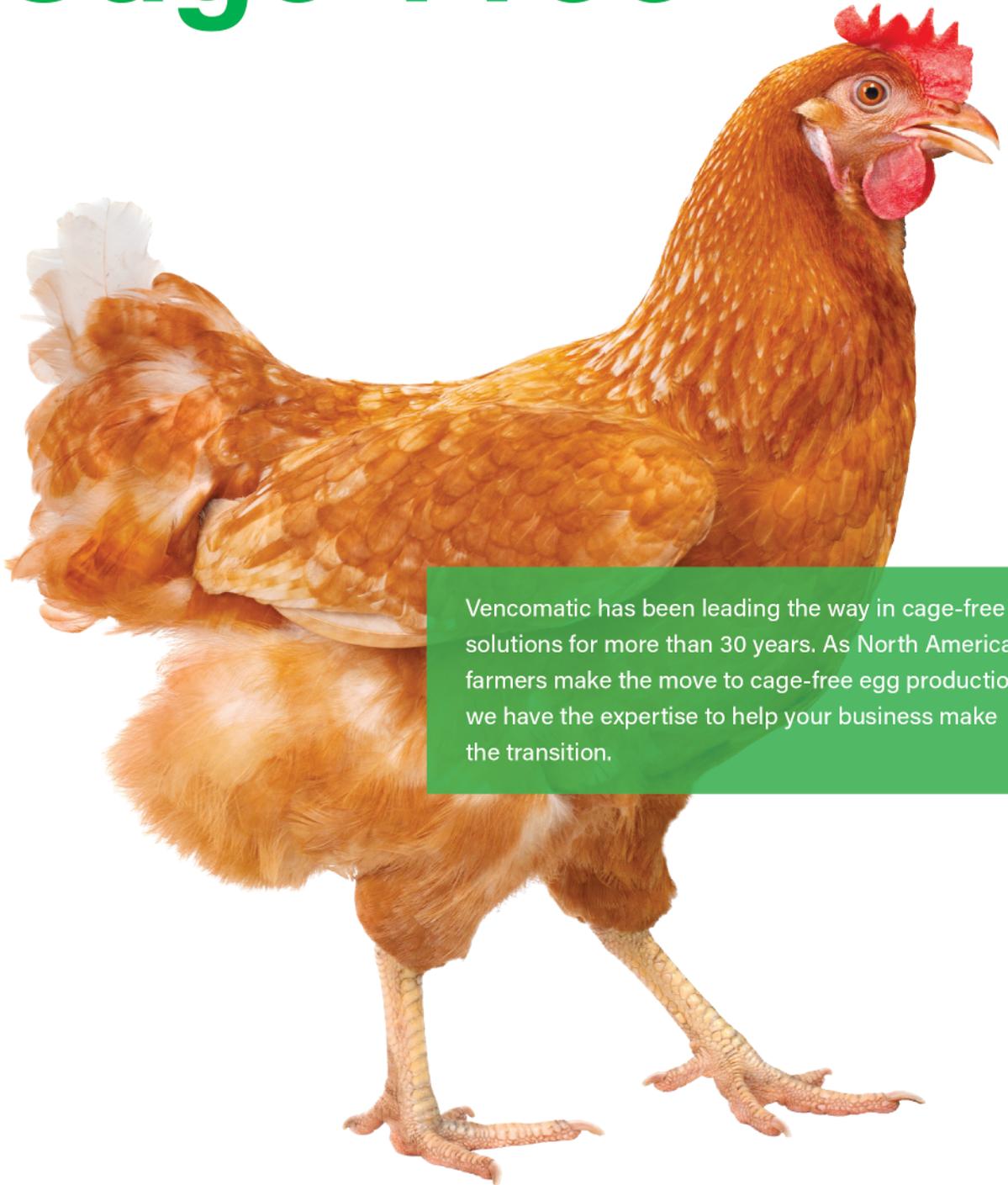
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CORPORATE HEADQUARTERS

303 North Main Street, Suite 500,
Rockford, Illinois 61101-1018
Tel: +1.815.966.5574

International Publisher:

Greg Watt; gwatt@wattglobal.com

North American Publisher:

Steve Akins; sakins@wattglobal.com

V.P. Director of Content and Innovation:

Bruce Plantz; bplantz@wattglobal.com

Director of Global Digital & North American Agribusiness Sales:

Jeff Miller; jmiller@wattglobal.com

EDITORIAL TEAM

Content Director - Agribusiness:

Terrence O'Keefe; tokeefe@wattglobal.com
Tel: +1.704.795.4646

Digital Content Director:

Tara Loszach
Nutrition Editor: Ioannis Mavromichalis, Ph.D.;
imavromichalis@wattglobal.com

Associate Editors:

Andrea Gantz, Ann Reus

Staff Reporter: Roy Graber

Agriculture Reporter: Austin Alonzo

Social Media & SEO Editor:

Kathleen McLaughlin

ART/PRODUCTION TEAM

Senior Art Director: Elizabeth Crosby

Production Manager: Bill Spranger;
bspranger@wattglobal.com Tel: +1.815.966.5427

Advertising Production Coordinator:
Connie Miller

SALES TEAM

USA/CANADA

Regional Manager: Pam Ballard,

Midwest, West, Canada;

pballard@wattglobal.com Tel: +1.815.966.5576

Regional Manager: Mary Harris,

East, Southeast;

mharris@wattglobal.com Tel: +1.815.980.5938

Classified Sales Representative: Craig Greuel;
cgreuel@wattglobal.com Tel: +1.815.966.5591

EUROPE, ASIA, AFRICA

Frans Willem van Beemen;

fvanbeemen@wattglobal.com Tel: +31.344.653442

EUROPE, LATIN AMERICA

Tineke van Spanje;

tvanspanje@wattglobal.com Tel: +31.495.526155

SOUTHEAST ASIA

Ding Ding Li;

dingdingli@vip.163.com Tel: +86.137.640.39062

EDITORIAL

BY TERRENCE O'KEEFE

tokeefe@wattglobal.com



Exactly how many laying hens are there in the US?

The USDA estimated the total table egg layer flock to be 311.6 million hens on December 1, 2016. Egg Industry's Top Egg Company Survey came up with an estimate of 313.2 million hens housed on December 31, 2016. Both of these estimates are based on surveys that rely on producers to accurately self-report the number of hens they have and on estimates for those companies that don't self-report. Additionally, Egg Industry's total is only for top egg producers and marketing groups and doesn't include small producers.

Based on the number of eggs on the market, I have heard estimates from industry sources that the total U.S. layer flock, including all large and small producers, might be as big as 325 million birds.

We may not know exactly how many laying hens there are in the U.S., but the low wholesale prices for eggs tells us there are too many hens.

Based on the expansion plans announced publicly by egg producers and those reported in aggregate in the Top Egg Company Survey, there is a good chance that there will be too many layers for demand levels well into 2017. Additional cage-free hens are being added rapidly with new construction and with house conversions, some of which are not resulting in the loss of housing space for very many hens.

This all means the supply of eggs isn't likely to shrink quickly and puts extra importance on increasing demand. Two demand areas that were hurt by the avian influenza outbreak of 2015 were sales of egg products as food ingredients and exports of egg products and shell eggs. Regaining market share in these markets will be critical for U.S. egg producers in 2017, otherwise the U.S. flock will need to shrink. ■

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US egg industry: **Cage-free demands, flock size increase**

The industry bounced back from avian influenza in 2016 and added more birds and cage-free housing to keep up with its purchaser pledges.

BY AUSTIN ALONZO

The U.S. egg industry recovered from the avian influenza outbreak, but 2016 challenged the industry with an oversupply situation and a cascade of cage-free egg purchase pledges from major buyers. The 2014-15 outbreak cost producers about 40 million layers and pullets. In 2016, layer flocks were restocked, shuffling Egg Industry's Top Egg Company survey rankings.

The Top Egg Company survey is conducted annually, and the results reported are comprised of company-submitted information and estimates made based on input from publicly reported information and industry sources. The survey reports on the number of hens housed on December 31, 2016. The 2017 report includes 63 companies with a collective 313.2 million hens.

Top 5 egg producers

Cal-Maine Foods Inc. and Rose Acre Farms retained the top two positions with 37.94 million and 25 million hens, respectively. Cal-Maine is the world's largest egg company and Rose Acre is the third largest.

Hillandale, with 18 million layers, moved to the



third ranking from the fourth ranking in the 2016 rankings. Versova Holdings L.L.C., a food company formed in May 2016 to manage the day-to-day operations of Centrum Valley Farms L.L.P., Trillium Farm Holdings L.L.C. and Iowa Cage-free L.L.P., moved into the fourth spot with 17.1 million hens. Rembrandt Enterprises rose one spot to the fifth position with 14.7 million hens. Last year, Trillium ranked fifth with 11.4 million hens.

Michael Foods, with 12.96 million layers, fell to the seventh ranking from the third spot.

Top US egg producers' rankings for 2017

Ranking	Egg company	Hens (millions)	Ranking	Egg company	Hens (millions)
1	Cal-Maine Foods ¹	37.94	33	Wenger Feeds/Dutchland Farms	2.20
2	Rose Acre Farms	25.00	34	Forsman Farms	2.15
3	Hillandale Farms	18.00	35	Sunrise Acres Egg Farm	2.10
4	Versova Holdings L.L.C. ²	17.10	36	CHS (formerly Hamilton Farm Bureau)	2.00
5	Rembrandt Enterprises	14.70	36	Giroux's Poultry Farm	2.00
6	Daybreak Foods	13.00	38	Mercer Landmark	1.95
7	Michael Foods ³	12.96	39	Heritage PMS/LaValle Egg Farms	1.94
8	Center Fresh Group	9.70	40	Chino Valley Ranchers/MCM Poultry	1.85
9	Midwest Poultry Services L.P.	9.50	41	Kreher's Eggs	1.83
10	Prairie Star Farms ⁴	9.40	42	Schipper Eggs L.L.C.	1.66
11	Hickman's Egg Ranch	9.10	43	Country Charm Eggs	1.60
12	Weaver Brothers	7.80	43	Lathem Farms	1.60
13	Herbruck's Poultry Ranch	7.35	43	Ritewood/Oakdell Egg Farms	1.60
14	Fremont Farms of Iowa	7.10	43	Hemmelgarn & Sons Inc.	1.60
15	ISE America	6.00	47	Berne Hi-Way Hatchery Inc.	1.50
15	Sparboe Farms	6.00	48	J.S. West & Company/JEM Eggs	1.33
17	Opal Foods	5.60	49	Simpson's Eggs	1.32
18	Kreider Farms	5.10	50	Egg Innovations	1.30
19	Gemperle Farms ⁵	4.91	50	Pine Hill Egg Ranch	1.30
20	Wabash Valley Produce	4.67	52	Morning Fresh Farms	1.20
21	Sunrise Farms Inc.	4.30	52	Hertzfeld Poultry Farms Inc.	1.20
22	Mahard Egg Farms	4.00	52	Demler Enterprises	1.20
22	National Food Corp.	4.00	55	Dakota Layers L.L.P.	1.10
24	Midwest Specialty Egg L.L.C.	3.90	56	Wilcox Farms	1.05
25	RW Sauder	3.50	57	Pearl Valley Eggs	0.75
26	Cooper Farms	3.46	58	Hillside Poultry Farms Inc.	0.70
27	S & R Egg Farms	3.40	58	The happy egg co.	0.70
28	Konos Inc.	3.00	60	SKS Enterprises	0.50
29	Esbenshade Farms	2.85	61	Sunrise Farms L.L.C.	0.46
30	Creighton Bros.	2.64	62	Weber Family Farms	0.40
31	Braswell Egg	2.44	63	Vital Farms	0.30
32	Minnich Poultry	2.40		Total	313.19

1. Cal-Maine acquired Dixie Egg Co./Foodonics in November 2016.

2. Versova Holdings L.L.C. is a holding company that combines the day-to-day operations of egg producers Centrum Valley Farms L.L.P., Trillium Farm Holdings L.L.C. and Iowa Cage-free L.L.P.

3. Includes Willamette Farms

4. Markets the combined egg production for Hoosier Pride, Rindler Poultry, Ross-Medford Farms & J Star Farms

5. Contains birds acquired from the purchase of Valley Fresh Foods.

Recovery from avian flu

Several companies made big jumps in the rankings after restocking regenerated their flocks. Center Fresh Group rose to No. 8 from No. 20, with its flock growing to 9.7 million hens from 4.8 million last year. Rembrandt's flock is larger than its post-avian flu outbreak amount of 11.06 million hens housed. Sunrise Farms Inc. jumped to No. 21 from No. 52 with an increase of 3.1 million hens. Dakota Layers, with no hens at the end of 2015, didn't begin restocking until January 2016. It rose to No. 55 with 1.1 million hens.

The avian influenza crisis drove up egg prices as the supply shrunk and remained smaller than usual, but in December 2016 Cal-Maine CEO Dolph Baker said the egg industry is now facing an oversupply situation. In a quarterly statement, Baker said egg producers are restocking hens and populations are near pre-outbreak levels, but demand for eggs is not keeping pace with the increased supply. It is unknown whether the outbreaks of avian flu in Europe, Asia and South America at the end of 2016 and beginning of 2017 will change this situation.

Other movement in the rankings

Minnich Poultry rose to No. 32 from No. 40 with an increase of about a half-million hens. Wenger Feeds/Dutchland Farms increased to No. 33 from No. 57 with an increase of 1.42 million hens. Pearl Valley Eggs dropped to No. 57 from No. 29 with a decline of 600,000 hens. Industry sources report the company is transitioning to cage-free production.

Additions to the rankings

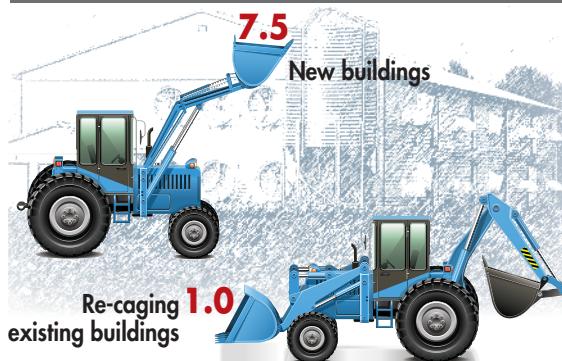
Four egg producers are added to the Top Egg Company rankings this year: Midwest Specialty Egg L.L.C., with 3.9 million hens; Chino Valley Ranchers/MCM Poultry, with 1.85 million hens; The happy egg co., with 700,000 hens; and Weber Family Farms with 400,000.

Chino Valley Ranchers and The happy egg co. both focus on specialty eggs. Chino Valley — based in Colton, California — produces cage-free, free-range, organic and nutritionally enhanced eggs. The happy egg co., based in San Francisco, produces free-range eggs. It is the U.S.

Hen capacities added in 2016

Million hens

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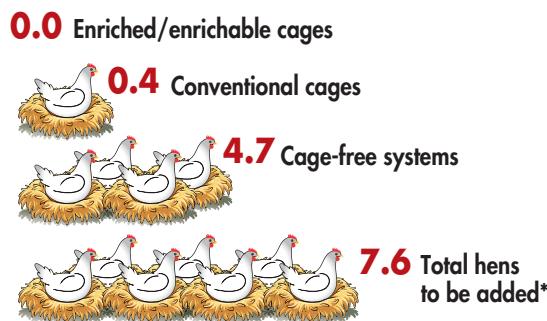


Egg producers who responded to the survey report adding housing for 7.5 million more hens in 2016.

Hen capacities to be added in 2017

Million hens

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Cage-free housing dominates the construction plans for egg producers in 2017.

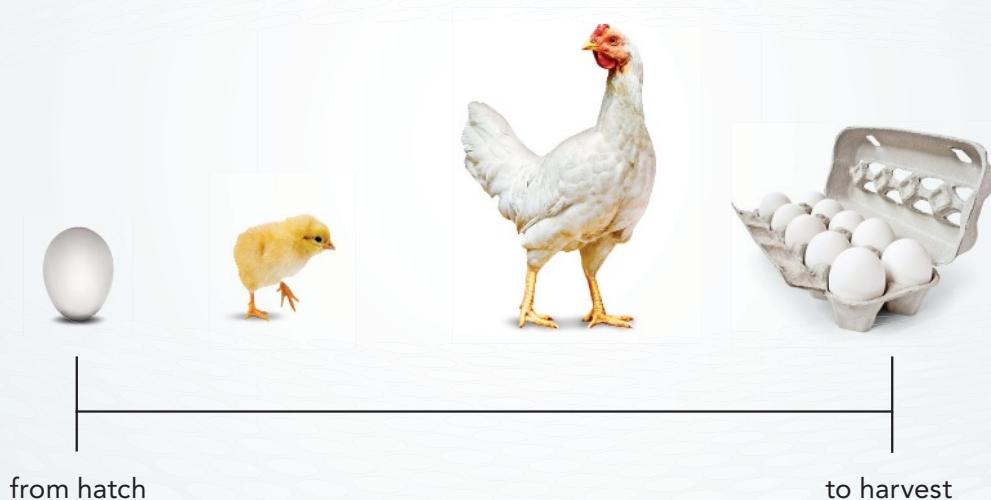
operation of British egg producer Noble Foods, one of the largest egg producers in Europe.

Mergers, partnerships and expansions

To meet the challenge of cage-free or other non-conventional production, many producers are pooling their resources to boost production. Others are expanding cage-free production by building new cage-free houses or replacing existing complexes with cage-free housing.

Cal-Maine and Rose Acre continue to work together to develop a cage-free egg facility near Bogata, Texas, ca-

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pable of housing 1.8 million birds. Hickman's Egg Ranch is working with Opal Foods to develop four farms, capable of housing 10 million



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cage-free birds, by 2020. The first farm near Wasco, California, is expected to open in early 2017. Weaver Brothers and Cooper Farms opened two new organic, cage-free egg farms in 2016. The pair plan to open two more new farms in the near future.

Hillandale is replacing aging cages with cage-free housing and is planning on building new cage-free houses in Hicksville, Ohio, and Bozrah, Connecticut, by the end of 2017. Rembrandt is planning on building a cage-free production site, capable of housing about 3 million birds, at an existing facility in Lake Preston, South Dakota. Michael Foods is converting a farm in Bloomfield, Nebraska, into a cage-free operation. Herbruck's Poultry Ranch is planning on adding cage-free housing for as many as 2.4 million hens. Gemperle Farms plans on converting all of its operations to cage free. Its layer flock includes 4.91 million hens.

As always, mergers and acquisitions are part of the business. Cal-Maine Foods acquired Dixie Egg Co. — No. 25 with 3.09 million layers in the 2015 rankings — at the end of 2016. In February 2016, Michael sold Michael Foods Canada (MFI Food Canada) to Burnbrae Farms, Canada's largest producer of table eggs.



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usa@sanovogroup.com

www.sanovogroup.com

Chris Long

chla@sanovogroup.com
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Conversion of cages to cage free

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2016

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2017

2.90 million spaces for caged hens were converted into **2.58 million** spaces for cage-free hens



Housing for one caged hen was converted to 0.7 and 0.9 hens in 2016 and 2017, respectively.

Industry attitudes on expansion

Egg producers were asked to report expansion projects undertaken in 2016 as well as any conversions of cage housing to cage free. In 2016, four producers converted housing for 2.7 million caged hens into housing for 1.9 million cage-free hens. In 2017, six producers plan on converting housing for 2.9 million caged hens into housing for 2.6 million caged hens.

In 2016, 15 egg producers reported adding housing for 7.5 million hens. Egg producers also report recaging housing for 1.0 million hens last year.

According to the survey responses, 14 egg producers plan on adding cage-free housing for a collective 4.7 million hens in 2017. The reported increases in cage-free hens varied from as few as 30,000 to as many as 950,000 birds. There is not much expansion planned outside of cage-free housing, with one survey respondent reporting plans to add 400,000 spaces for cage-housed hens in 2017.

Survey respondents report intentions to add 7.6 million additional hens in 2017, and this includes a combination of hens in housing constructed in 2016 but not yet stocked as well as housing constructed and stocked in 2017. ■

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US egg producers predict **not** all hens cage free by 2025

Egg producers were asked for their predictions regarding the state of cage-free shell egg sales and hen housing in 2025.

BY TERRENCE O'KEEFE

The big story in the U.S. egg industry in 2016 was the number of cage-free purchase pledges made by major retail and foodservice shell egg purchasers, and similar pledges by foodservice and food companies regarding egg products purchases. Most of these cage-free shell egg and egg product purchase pledges are due to take effect in 2025.

In a report released on January 9, 2017, the U.S. Department of Agriculture (USDA) estimated that the number of cage-free egg layers housed in the U.S. had increased to 37.6 million by December 2016, with 14.1 million of these hens being certified organic. The USDA estimated the total table egg layer flock to be 311.6 million hens on December 1, 2016. Based on these USDA estimates, cage-free layers represented 12.1 percent of the total egg-laying flock in December 2016. Egg Industry estimates that no more than 1 percent of the total U.S. table egg layer flock is housed in fully enriched cages.



As part of the Top Egg Company Survey, U.S. egg producers were asked to predict the percentages of the U.S. table egg flock that will be housed in conventional cages, enriched cages and cage free in 2025. Thirty-one egg producers housing 174 million hens answered the opinion questions in the Top Egg Company survey.

The average of the egg producers' responses was that 47.7 percent of U.S. hens would be housed in conventional cages in 2025. The responses ranged from a high of 80 percent to a low of 0 percent with a median response of 55 percent.

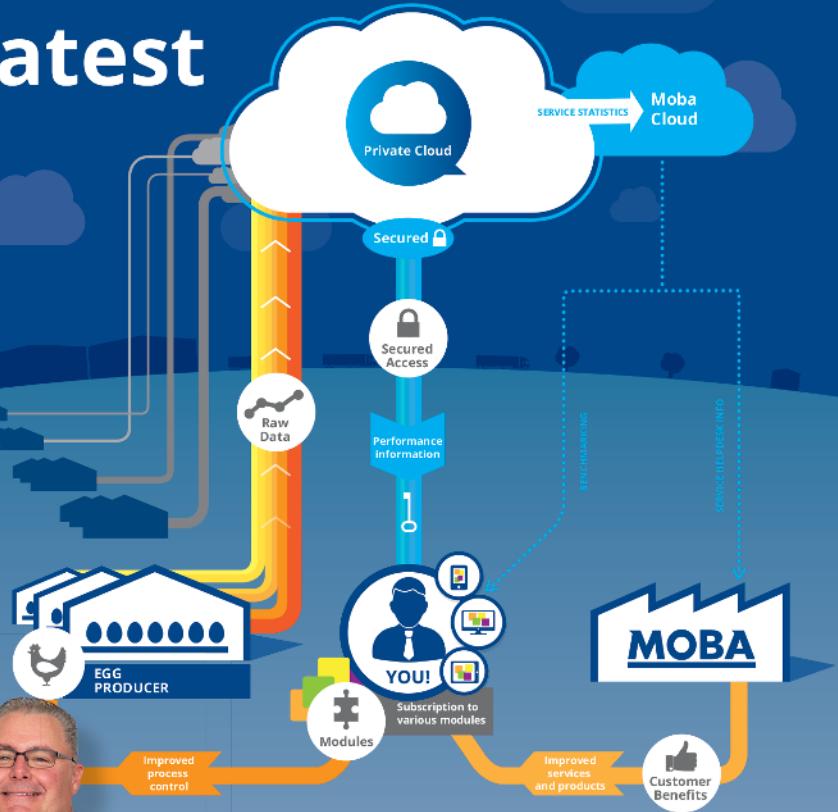
Most U.S. egg producers predict enriched cages will still be used in 2025, with the average prediction that 6 percent of U.S. hens will be housed in enriched cages



Compare these Top Egg Company survey results with last year's:
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that year. The responses ranged from 0 percent to 25 percent with 1 percent being the median response.

U.S. egg producers, on average, don't predict that cage free will be the predominant means of egg production in 2025, with the average of the predictions being 46.3 percent. The responses to this question ranged from 10 to 90 percent with the median response being 40 percent.

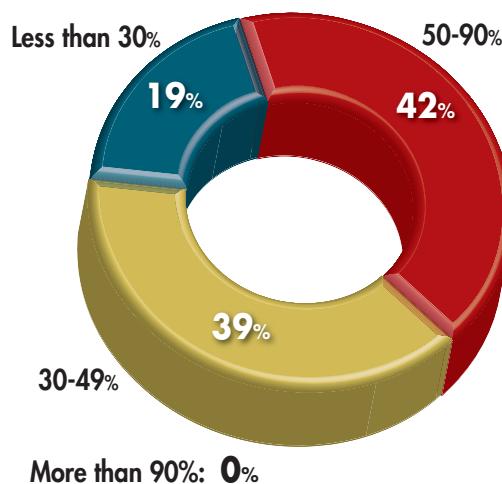
Will retail egg sales be 100 percent cage free?

Most major U.S. shell egg retailers have pledged to switch all of their egg purchases to cage free by some future date, generally around 2025. Some of these pledges

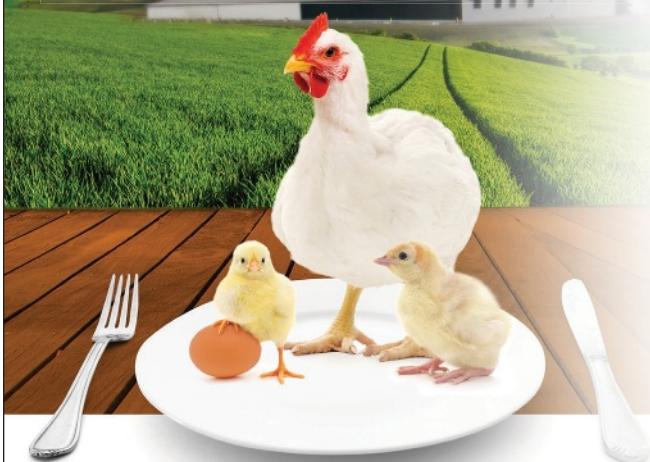
U.S. egg producers were asked what percentage of eggs sold by retailers that have made cage-free purchase pledges will be cage free in 2025. They predict that cage-produced eggs will still be sold by retailers that have made cage-free egg purchase pledges in 2025.

Of the eggs sold by retailers that have made cage-free purchase pledges, how much will be cage free in 2025?

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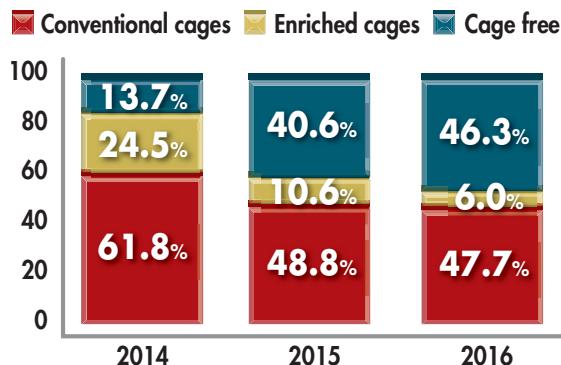
contain language relating to “affordability and availability” of cage-free eggs.

The U.S. egg market was in an oversupply situation in 2016 for cage-produced and cage-free eggs. Many U.S. consumers have continued to purchase less expensive cage-produced eggs in stores where they are given a choice between cage-produced and cage-free eggs.

U.S. egg producers are not convinced that consumers will change their attitudes regarding cage-free eggs by 2025. They were asked to select the statement regarding cage-free retail egg sales in 2025 that most closely matches what they think will happen. None of the egg producers agreed with the statement, “Cage-free eggs will represent more than 90 percent of eggs sold by retailers that have made pledges.” More than 80 percent of egg producers selected the statements, “Cage-free eggs will represent 50 to 90 percent of eggs sold by retailers that have made pledges” and “Cage-free eggs will represent 30 to 49

Predictions for egg production in the US by housing system in 2025

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U.S. egg producers predict that more layers will be housed in cages than cage free in 2025.

percent of eggs sold by retailers that have made pledges.” Nineteen percent of egg producers selected the statement, “Cage-free eggs will represent less than 30 percent of eggs sold by retailers that have made pledges.” ■

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20 top US egg producers of 2016

Learn more about the companies WATT Global Media ranks as the top 20 table egg producers in the U.S. in 2016.

BY AUSTIN ALONZO

The egg industry experienced a year of transition in 2016. The year ended with companies rocked by the avian influenza outbreak of 2014-15 almost fully recovered and restocked. Meanwhile, major egg companies put plans in motion to increase their cage-free egg output in the future. Several called cage free the future of the industry.

The top 20 egg producers — according to data from Egg Industry's Top Egg Company Survey, which is part of WATT Global Media's database on the world's leading broiler, turkey and egg producers — are ranked according to the size of their layer flock at the end of 2016. More information about the companies can be found by clicking on the company's name or visiting the top poultry companies database.

Collectively, the top 20 companies account for 230.92 million birds.

1 Cal-Maine Foods Inc., 37.94 million hens
 Cal-Maine Foods Inc. is the largest egg producer in the U.S. and the world. As of December 31, 2016, the company's layer flock included 37.94 million hens. Cal-Maine produces white and brown cage-produced eggs, cage-free eggs, free-range eggs, organic eggs and nutritionally enhanced



eggs. It also produces liquid egg products in institutional or bulk packaging.

In fiscal 2016, its net sales were \$1.908 billion, an increase from the \$1.576 billion it reported the previous year. During the fiscal year, specialty eggs — nutritionally enhanced, cage-free eggs and organic eggs — accounted for 29.1 percent of the company's shell egg revenue. Cal-Maine opened its fiscal 2017 with quarterly net losses of \$30.9 million and \$23 million, compared with net income of \$143 million and \$109.2 million in the same two quarters of the previous year. In his quarterly statement published in December 2016, CEO Dolph Baker said the U.S. egg market is dealing with an oversupply situation created by the lingering effects of the 2015 avian influenza outbreak. Egg producers are restocking hens and populations are nearing pre-outbreak levels, but demand from domestic and export markets is

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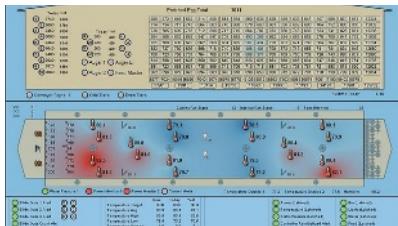
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not keeping pace with the increased supply.

In April 2015, Cal-Maine announced a joint venture with Rose Acre Farms Inc., the second-largest U.S. egg company, to build a cage-free egg production facility near Bogata, Texas. Stocking began in March 2016, and the facility is expected to house about 1.8 million birds in early 2017. In June 2016, Baker said the company has invested \$160 million in capital outlay projects around the country to improve its capacity to produce cage-free, organic, conventional and California Proposition 2-compliant eggs. In November 2016, the company completed its acquisition of Foodonics International Inc. and its entities doing business as Dixie Egg Co.

2 Rose Acre Farms Inc., 25 million hens
 Rose Acre Farms Inc. is a family-owned egg farm and is the second largest egg producer in the U.S. and the third largest egg producer in the world. Affiliated and subsidiary corporations include Rose

Acre Farms International, Marshall Egg Products, Johnson County Egg Farm and NEPCO Egg of Georgia. As of December 31, 2016, its layer flock included 25 million hens.

In April 2015, Rose Acre entered a joint venture with top U.S. egg company Cal-Maine Foods to build a cage-free egg production facility near Bogata, Texas. Stocking began in March 2016, and the facility should be populated with about 1.8 million birds in early 2017. The company's new, \$80 million cage-free egg farm near Bouse, Arizona, was expected to open in fall 2016. The complex is intended to house as many as 3 million birds.

In May 2016, the company prevailed in a 10-year-old "dust and feathers" dispute over its emissions from a farm in Hyde County, North Carolina. The company settled with the North Carolina Department of Environmental and Natural Resources, but the terms of the settlement were not released. Rose Acre expected to open a new, \$5 million corporate headquarters building in Seymour, Indiana, in early 2017.

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3 Hillandale Farms, 18 million hens

Hillandale Farms is one of the U.S.'s leading suppliers of shell eggs. It has production facilities in the Northeast, Midwest and Southeast, and supplies retailers and distributors throughout the eastern U.S. In 2015, Hillandale completed its purchase of three egg farms in the eastern U.S. owned by Moark L.L.C., the layer division of Land O'Lakes Inc. As of December 31, 2016, its layer flock included 18 million hens.

In July 2016, the company announced plans to shift its production from conventional to cage-free housing systems. Chief executive Gary Bethel said all future expansion at Hillandale's farms will be cage free and all existing facilities will be replaced by cage-free barns as they age. The company is building new cage-free houses in Hicksville, Ohio, and Bozrah, Connecticut. Both facilities should be completed by the end of 2017.

4 Versova Holdings L.L.C., 17.1 million hens

Versova Holdings L.L.C. is a food company formed in May 2016 to manage the combined day-to-day operations of egg producers Centrum Valley Farms L.L.P., Trillium Farm Holdings L.L.C. and Iowa Cage-free L.L.P. Centrum Valley, Trillium and Iowa Cage-free will continue to exist independently. As of December 31, 2016, the company's layer flock included 17.1 million layer hens.

Versova will serve as a holding company with a new management team overseeing business functions of Centrum, Trillium and Iowa Cage-free. It will handle marketing, customer relationships, information technology, operations, feed management, human resources and finance.

Versova produces shell egg products, including white and brown cage-produced eggs and cage-free eggs. It also produces liquid egg products.

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5 Rembrandt Enterprises, 14.7 million hens

Rembrandt Enterprises, doing business as Rembrandt Foods, is privately held and focuses on producing egg products for the food-service and ingredients industries. As of December 31, 2016, the company's layer flock included 14.7 million hens. Rembrandt produces its egg products from white and brown conventionally produced eggs, cage-free eggs, free-range eggs and organic eggs. Its products include liquid egg, dried egg, and hard-cooked peeled eggs. Rembrandt produces consumer and institutional or bulk packaged egg products. In 2017, it plans to launch a 90 percent protein egg white isolate product for the sport and senior nutrition markets.

The Iowa company was rocked by the 2014-15 U.S. outbreak of highly pathogenic avian influenza. It lost more than half of its layer flock to the disease. In September 2015, the company announced its plans

to repopulate its layer flocks during the next 12 to 14 months and bring workers back to their jobs.

With the avian influenza outbreak behind it, the company plans to make cage-free eggs the company's standard going forward and to tighten up biosecurity in its Iowa facilities. In April 2016, Rembrandt said it plans to build a cage-free production site at an existing facility in Lake Preston, South Dakota. Construction began in 2016 and stocking will begin in 2017. The facility will house about 3 million birds when fully stocked.

6 Daybreak Foods Inc., 13 million hens

Daybreak Foods Inc. is privately held and is involved in shell egg and egg products production. Its layer flock includes 13 million hens. It produces conventional white eggs and liquid egg products.

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7 Michael Foods Inc., 12.96 million hens

Michael Foods Inc. is a leading food processor and distributor with business in egg products as well as refrigerated grocery and potato products. The company is the largest supplier of processed eggs in the world. The company is owned by Post Holdings Inc., which purchased it from GS Capital Partners for \$2.45 billion in 2014. In 2015, Post completed

a \$90 million acquisition of Willamette Egg Farms, at the time the 30th largest egg producer in the U.S. The 2016 rankings contain Willamette Farms' birds. As of December 31, 2016, its layer flock included 12.96 million birds.

Michael Foods was deeply affected by the U.S. avian influenza outbreak of 2014-15. In its 2016 annual report, published in November 2016, Post said the repopulation of its egg supply is nearly complete. It called the outbreak a "generational event," which disrupted Michael, but it predicts normalization by the end of fiscal 2017. Michael's egg products accounted for 28 percent of Post's \$5.026 billion in net sales in fiscal 2016.

In a December 2015 statement, Michael Foods announced it will become an advocate for cage-free eggs with consumers and customers. In August 2016, the company, calling cage free the future of the egg industry, said it will convert a layer farm in Bloomfield, Nebraska, into a cage-free operation between spring 2017 and 2020. At that site, 32 layer barns will be replaced with 12 cage-free houses.

In February 2016, Burnbrae Farms, Canada's largest producer of table eggs, entered into an agreement to acquire the assets of Michael Foods Canada (MFI Food Canada). In September 2016, Post Holdings agreed to acquire National Pasteurized Eggs. The transaction is expected to close in early 2017. In November 2016, Post CEO Rob Vitale said mergers and acquisitions will remain a priority for the company going forward. In December 2016, Post announced it will pay a \$75 million settlement to settle an egg-related class action lawsuit filed in 2008. The payment will end Michael's involvement in the case.

Top 20 U.S. egg producers for 2017

Ranking	Egg company	Hens (millions)
1	Cal-Maine Foods ¹	37.94
2	Rose Acre Farms	25.00
3	Hillandale Farms	18.00
4	Versova Holdings L.L.C. ²	17.10
5	Rembrandt Enterprises	14.70
6	Daybreak Foods	13.00
7	Michael Foods ³	12.96
8	Center Fresh Group	9.70
9	Midwest Poultry Services L.P.	9.50
10	Prairie Star Farms ⁴	9.40
11	Hickman's Egg Ranch	9.10
12	Weaver Brothers	7.80
13	Herbruck's Poultry Ranch	7.35
14	Fremont Farms of Iowa	7.10
15	ISE America	6.00
15	Sparboe Farms	6.00
17	Opal Foods	5.60
18	Kreider Farms	5.10
19	Gemperle Farms ⁵	4.91
20	Wabash Valley Produce	4.67
TOTAL		230.92

1. Cal-Maine acquired Dixie Egg Co./Foodonics in November 2016.
 2. Versova Holdings L.L.C. is a holding company that combines the day-to-day operations of egg producers Centrum Valley Farms L.L.P., Trillium Farm Holdings L.L.C. and Iowa Cage-free L.L.P.
 3. Includes Willamette Farms
 4. Markets the combined egg production for Hoosier Pride, Rindler Poultry, Ross-Medford Farms & J Star Farms
 5. Contains birds acquired from the purchase of Valley Fresh Foods.

8 Center Fresh Group, 9.7 million

Center Fresh Group is owned by eight Iowa farm families. The company is comprised of five divisions involved in egg production: Center Fresh Egg Farm, Sioux County Egg Farm, Hawkeye Pride, Sioux County Pullets and Center Fresh Africa-Mozambique. The U.S. farms are located in Iowa and Ohio. As of December 31, 2016, the company's layer flock

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included 9.7 million hens. Center Fresh produces conventionally raised and cage-free eggs as well as liquid egg products.

The company's Iowa flocks were affected by the 2014-15 U.S. avian influenza outbreak. In June 2015, the company was sued by Michael Foods, one of the U.S.'s largest egg producers, for allegedly breaching its egg supply contract after the avian influenza outbreak and keeping Michael Foods from meeting its supply obligations. In May 2016, Chief Operating Officer J.T. Dean told Bloomberg News that Center Fresh lost about 5.5 million birds, but it expected to be at full production capacity by the end of 2016.

9 Midwest Poultry Services L.P., 9.5 million hens

Midwest Poultry Services L.P. is an Indiana-based shell egg producer for the retail market.

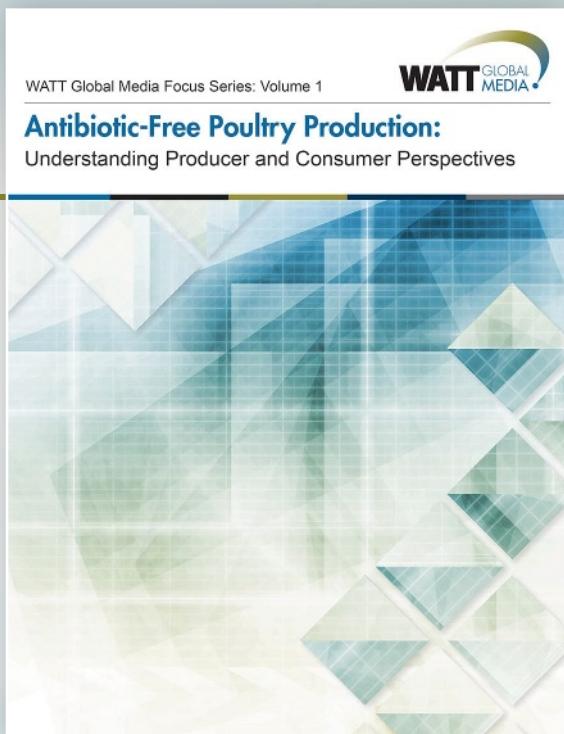
It is a family-owned business that employs 500. As of December 31, 2016, the company's layer flock included 9.5 million hens. The company produces conventional white eggs, cage-free eggs and nutritionally enhanced eggs.

10 Prairie Star Farms, 9.4 million hens

Prairie Star Farms markets the combined egg production of Rindler Poultry, Ross-Medford Farms, Hoosier Pride and J Star Farms. As of December 31, 2016, the company's layer flock included 9.4 million hens.

11 Hickman's Egg Ranch, 9.1 million hens

Hickman's Egg Ranch, also known as Hickman's Family Farms, is the largest shell egg producer west of the Rockies. It is a family-



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owned business with hens in Arizona and Colorado, distribution operations in Iowa, Nevada and California and customers from Iowa to Hawaii. It has about 300 full-time employees. As of December 31, 2016, the company's layer flock included 9.1 million hens.

In December 2014, the company announced it would add 300,000 cage-free hens through its partnership with Colorado Egg of Hudson, Colorado. In September 2015, Hickman's announced plans to add two new cage-free egg operations in Tonopah and Arlington, Arizona. The planned facilities will house 2 million hens.

In September 2016, Central Valley Eggs L.L.C. — a partnership between Hickman's and Opal Foods — began construction of a cage-free egg production and processing facility near Wasco, California. The facility could begin shipping eggs in early 2017. According to a January 2016 release from Opal Foods, Central Valley intends to build four, 2.5 million bird cage-free farms by 2020.

12 **Weaver Brothers,**
7.8 million hens
Weaver Brothers Inc.
is a third-generation

family farm operation still owned and managed by the founders. The company offers cage-free and organic products and employs 350. As of December 31, 2016, the company's layer flock included 7.8 million hens.

In December 2014, Weaver Brothers created a joint venture with Cooper Farms through a 50-50 purchase of the Perham Egg facility in Fort Recovery, Ohio, which opened in July 2014. The new company, which is called CW Egg Products, produces liquid egg products. The new owners have indicated they will increase production at the facility and add layers to support this expansion. In November 2015, Weaver Brothers purchased a new warehouse in Russia, Ohio, as part of expanding its biosecurity efforts.

In June 2016, the company announced completion of construction of two new organic, cage-free egg farms and plans for two new cage-free layer farms with capacity for more than one million birds each in partnership with

Cooper Farms and others local farms. In the announcement, Weaver Brothers called cage-free and organic production the future of its company, and said it will focus on growing those areas.

13 **Herbruck's Poultry Ranch, 7.35**
million hens

Herbruck's Poultry Ranch Inc. is Michigan's largest egg farm, producing 60 percent of Michigan's eggs. As a fully integrated business, Herbruck's is involved in breeding, agriculture, feed and fertilizer production. The company also partners with 25 small farms to produce organic and cage-free eggs. Due to a Michigan state law passed in 2009, by 2019 all layers housed in the state must be able to fully extend their wings without touching the side of an enclosure or another hen, and have the ability to turn around freely.



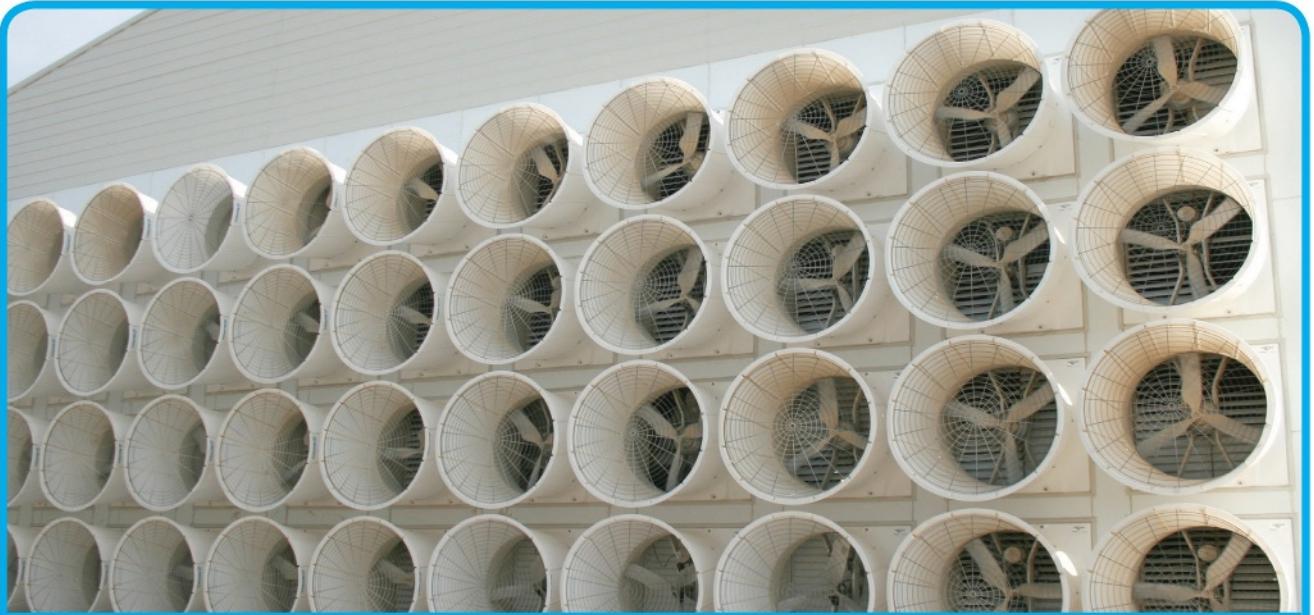
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As of December 31, the company's layer flock included 7.35 million hens. Herbruck's produces white and brown conventionally raised eggs, cage-free eggs, organic eggs and nutritionally enhanced eggs. It also produces liquid egg products, consumer packed and institutional or bulk packaged egg products.

In May 2014, the company announced plans to invest \$33 million in its Saranac, Michigan, production facility over the next three years. The company received a \$750,000 performance-based grant from Michigan to support the construction of the facility in June 2015. In April 2016, Herbruck's announced plans to build a new facility — including a feed mill and depot building for flock services — in Topeka, Indiana. The new facility is expected to be fully staffed and operational in early 2017. In the same month, it announced plans to expand an operation in Mercersburg, Pennsylvania, by adding poultry barns to house cage-free and organic laying hens. In December

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2016, a local newspaper in Chambersburg, Pennsylvania, reported the company was seeking state permits to build a \$90 million cage-free operation including eight barns that could house as many as 2.4 million hens.

14 Fremont Farms of Iowa, 7.1 million hens

Fremont Farms of Iowa L.L.P. is a producer and processor of liquid egg products. As of December 31, 2016, the company's layer flock included 7.1 million hens.

15 ISE America Inc., 6 million hens

ISE America Inc. is a totally integrated egg laying and production operation. The company is a subsidiary of ISE Inc., headquartered in Japan. ISE Inc. entered the chicken genetics and breeding industries in Japan in 1912. As part of the company's continued research into uses for eggs in the human diet, the ISE Egg, a lower-cholesterol egg, was developed and marketed beginning in 1989.

As of December 31, 2016, the company's layer flock included 6 million hens.

15 Sparboe Farms, 6 million hens

Sparboe Farms is a major shell egg producer and marketer in the United States. Its subsidiary Sparboe Foods provides egg products. The company also owns Agri-Tech, which produces premixes for lower feed cost. As of December 31, 2016, its layer flock included 6 million hens.

17 Opal Foods L.L.C., 5.6 million hens

Opal Foods, an entity created by Visalia, California, private equity fund AGR Partners, was launched in May 2014 with the acquisition of Moark's Midwest operations. As of December 31, 2016, its layer flock included 5.6 million hens.

Opal Foods began with 5.6 million laying hens at

farms in Missouri and Colorado, as well as a new farm in Neosho, Missouri. The Neosho farm will eventually be home to 800,000 cage-free hens, which will bring the company's total hen head count to more than 6 million. Opal Foods reported that many of the purchased farms had recently been renovated to comply with California's future production standards, and some are among the most modern in the country. Opal Foods will be a franchisee of Eggland's Best and will continue serving the same customers. The company expects annual sales in excess of \$200 million.

In January 2016, Opal announced Central Valley Eggs — a partnership between Opal and Arizona-based Hickman's Egg Ranch — intends to build four, 2.5 million-bird farms in California by 2020. In the announcement, Opal said it was completing a 1.2 million-hen cage-free expansion in Missouri and recently began construction on a 1.5 million-hen cage-free complex in Colorado.

In September 2016, local news organizations in Fresno and Visalia, California, reported a \$300 million Central Valley complex capable of housing more than 3 million cage-free hens was under construction. The complex would be the largest in the state and could be shipping eggs in early 2017. In total, the four planned farms could house as many as 10 million birds.

18 Kreider Farms, 5.1 million hens

Kreider Farms supplies shell eggs to supermarkets and wholesalers in the northeastern United States and sells cage-free eggs under the Noah's Pride brand. Kreider is the largest egg producer in Pennsylvania with facilities in Mount Joy, Manheim, Middletown and Mount Pleasant. As of December 31, 2016, the company's layer flock included 5.1 million hens. Kreider produces white and brown eggs, conventionally raised and cage-free eggs, organic eggs and nutritionally enhanced eggs.

In April 2016, Kreider Farm's cage-free flock gained American Humane Certified certification from the American Humane Association.

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19 Gemperle Farms, 4.91 million hens

Gemperle Farms produces a variety of types of eggs, including organic and cage free. As of December 31, 2016, the company's layer flock included 4.91 million hens. In March 2016, the company announced its intention to convert all of its operations to cage-free production by 2024. The 2016 rankings contain birds acquired from the purchase of Valley Fresh Foods.

20 Wabash Valley Produce, 4.67 million

Wabash Valley Produce Inc. engages in egg and turkey production. As of December 31, 2016, the company's layer flock included 4.67 million birds. It produces conventionally raised white eggs, cage-free eggs, as well as liquid and dry egg products. ■

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Convention looks to the future

Event continues to grow and highlight products, services and technologies for poultry and egg producers

The 2017 Midwest Poultry Federation (MPF) Convention will explore what the future has to offer the poultry and egg industries.

This year, the convention has expanded into more exhibit hall space, and speakers will include nationally recognized figures. Face-to-face networking opportunities offer the opportunity for attendees to meet with colleagues, customers and industry friends.

As the largest regional poultry convention in the U.S., MPF showcases all that the poultry industry has to offer at an affordable price for attendees.

All revenue generated from the convention goes back to its members (comprised of 12 poultry associations in the Midwest) and to support poultry programs. The MPF Convention is a great place to learn about products, services and technologies that are vital to producers' success. ■

Learn & Go Labs

Learn & Go Labs on Wednesday, March 15 will focus on commodity and ingredient hedging and price management. Also, Clara Brandt from the University of Minnesota will present on a new poultry biosecurity website that can be used as a secure tool by producers to keep their farm information up to date in case of a disease outbreak.

WHEN AND WHERE

MARCH 14-16, 2017

SAINT PAUL RIVERCENTRE

175 W. KELLOGG BLVD.

SAINT PAUL, MINNESOTA 55102

Pre-show events

Pre-show events include:

- North Central Avian Disease Conference, March 13-14 (separate registration fee applies)
- Organic Egg Farmers of America Symposium, March 14 (separate registration fee and process applies)
- MPF Pre-Show Symposium on Poultry Nutrition, March 14
- MPF Welcome Reception, March 14

Workshop topics

Convention workshops include topics relevant

to poultry and egg producers, such as:

- Turkey Growing
- Pullet/Layer Health
- Turkey Health
- Broiler Production
- Egg Production
- Disease Response Planning
- Turkey Breeder
- Turkey Processing
- Organic & Specialty Poultry



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