

Egg Industry

News for the egg industry worldwide
volume 123 number 2

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Top US egg producer rankings for 2018: Cage-free surplus



Egg producers predict cages won't go away by 2025



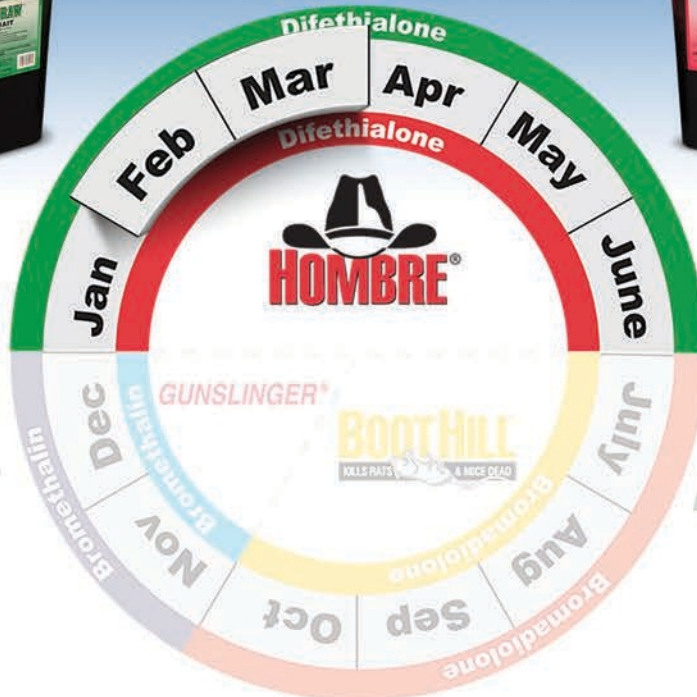
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EDITORIAL

BY TERRENCE O'KEEFE

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Will US cage-free conversion be a marathon or a sprint?

The USDA estimate, released on January 8, 2018, of the non-organic cage-free hen flock in the U.S. is 35 million hens. The number of hens housed cage free in the U.S., excluding organic, has increased from 8.5 million in 2014 to 35 million in January 2018, a 317 percent increase, according to USDA estimates. It is estimated that 227.2 million non-organic cage-free layers will be needed by 2026 to meet all of the already announced future cage-free egg purchase pledges. If all of these pledges are fully kept, then U.S. egg producers would have to add or convert an average of 24 million cage-free hens worth of housing each year for the next eight years to supply all of these needs.

The egg producers who responded to the Top Egg Company Survey don't think all of the purchase pledges will be fully realized. For instance, more than half of those responding think less than half of shell eggs sold at retail in 2025 will be cage free. When asked how hens would be housed in 2025, the average survey response was that 45.2 percent of hens would be housed cage free in 2025.

The USDA estimated the total hen flock in the U.S. to be 319.7 million in December of 2017. If survey respondents are correct about cage-free hen numbers in 2025, then this means the cage-free flock — organic and “just” cage-free — that year would be 144.5 million hens. This means the rate of conversion of hen housing to cage free would “only” need to average 13.6 million head worth per year.

Given the surplus of cage-free eggs, conversion of hen housing to cage free will slow down. Most of the large cage-free purchase pledges don't kick in until 2023 and later. It isn't possible for the next eight years to go by without periods of significant market disruption for eggs. It's going to be messy. ■

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Top US egg producer rankings for 2018: Cage-free surplus

The rush of cage-free egg future purchase pledges in 2016 led to rapid expansion of cage-free production and a surplus of cage-free eggs in 2017.

TERRENCE O'KEEFE

The number of hens housed cage free in the U.S., excluding organic, has increased from 8.5 million in 2014 to 35 million in January 2018, a 317 percent increase, according to USDA estimates. In spite of the large number of pledges by restaurant chains, food service distributors, retail outlets and food companies to purchase only cage-free eggs by some future date, the demand for cage-free eggs has not kept up with the increase in supply. As a result, Cal-Maine Foods and Rose Acre Farms, the country's two largest egg producers, both announced adjustments to their cage-free programs.

During its earnings report for the first quarter of fiscal year 2018, released on October 2, 2017, Cal-Maine Foods' CEO Dolph Baker said that, because the supply of cage-free eggs is not consistent with the demand, the company has adjusted its cage-free

egg production levels in line with customer demand. Also in October, Rose Acre Farms announced that it was at least temporarily discontinuing the addition of cage-free laying systems, or as CEO Marcus Rust put it, the company is "shutting [its] construction program down."

In contrast, Michael Foods Inc. Post Holdings CEO Robert V. Vitale said he feels "very comfortable" with the way its Michael Foods subsidiary is matching the production of cage-free egg products with the demand. "We are moving along with our customers and trying to be supportive of their overall initiatives in this area, so our capacity is very nicely matched against the demands," Vitale said while speaking during a November 17 conference call. Michael Foods is one of the largest egg products companies in the world and is not a significant supplier of retail shell eggs.

Top US egg producers' rankings for 2018

Ranking	Egg company	Hens (millions)	Top Company URL
1	Cal-Maine Foods ¹	40.10	http://goo.gl/P1cw6f
2	Rose Acre Farms	26.90	http://goo.gl/nesekez
3	Hillandale Farms	16.73	http://goo.gl/Pj6gff9
4	Versova Holdings ²	16.40	https://goo.gl/NV7gTw
5	Daybreak Foods	12.80	http://goo.gl/Zv6tu6
6	Rembrandt Enterprises	12.50	http://goo.gl/uwyZo5
7	Michael Foods	12.18	http://goo.gl/Zhxiwh
8	Center Fresh Group	9.70	http://goo.gl/h01kex
9	Midwest Poultry Services L.P.	9.50	http://goo.gl/0q5dKT
10	Prairie Star Farms ³	9.40	http://goo.gl/OXj3Wi
11	Herbruck's Poultry Ranch	8.40	http://goo.gl/v7fNAX
12	Weaver Brothers	8.00	http://goo.gl/5D74lO
13	Hickman's Egg Ranch	7.35	http://goo.gl/flWpo4
14	Fremont Farms of Iowa	7.30	http://goo.gl/zbGkFQ
15	Sparboe Farms	6.10	http://goo.gl/Hb7ldl
16	ISE America	6.00	http://goo.gl/B3i4LX
17	Kreider Farms	5.20	http://goo.gl/3ihJO3
18	Opal Foods	5.18	http://goo.gl/XUvCLI
19	Gemperle Farms	4.90	http://goo.gl/jjZ6Ex
20	Sunrise Farms Inc.	4.50	http://goo.gl/J3snec
21	Wabash Valley Produce	4.39	http://goo.gl/mZEdTN
22	S & R Egg Farms	4.35	http://goo.gl/tVefBl
23	Mid-States Specialty Eggs	4.23	https://goo.gl/SINbrE
24	National Food Corp.	4.08	http://goo.gl/olJcUu
25	Mahard Egg Farms	4.00	http://goo.gl/4xrbwE
26	RW Sauder	3.50	http://goo.gl/6CFveb
27	Ritewood/Oakdell Egg Farms	3.40	http://goo.gl/xeqYl8
28	Cooper Farms	3.15	http://goo.gl/NlYaA6
29	Esbenshade Farms	2.80	http://goo.gl/gQK7QQ
30	Creighton Bros.	2.66	http://goo.gl/oqD2hh
31	Konos Inc.	2.58	http://goo.gl/7N6C6k
32	CHS (formerly Hamilton Farm Bureau)	2.28	http://goo.gl/Sc7Jkh
33	Sunrise Acres Egg Farm	2.28	http://goo.gl/0jxpsB
34	Minnich Poultry	2.25	http://goo.gl/yTgtNg

WATTAgNet.com **WORLD'S
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THE WORLD'S LEADING EGG PRODUCERS

Top US egg producers' rankings for 2018 (continued)

Ranking	Egg company	Hens (millions)	Top Company URL
35	Wenger Feeds/Dutchland Farms	2.20	http://goo.gl/FZ67eR
36	Forsman Farms	2.15	http://goo.gl/lp4Wfi
37	Braswell Egg	2.09	http://goo.gl/ShBS7F
38	Giroux's Poultry Farm	2.00	http://goo.gl/7sFvKo
39	Heritage PMS/LaValle Egg Farms	1.94	http://goo.gl/bBa9Lg
40	Kreher's Eggs	1.88	http://goo.gl/ZrjSMp
41	Chino Valley Ranchers/MCM Poultry	1.80	https://goo.gl/cC7KlK
42	Hemmelgarn & Sons	1.66	http://goo.gl/dmPjc6
43	Pine Hill Egg Ranch	1.65	http://goo.gl/8pvLl3
44	Country Charm Eggs	1.60	http://goo.gl/LFRxRr
45	Lathem Farms	1.60	http://goo.gl/CnTpDd
46	Schipper Eggs	1.60	http://goo.gl/cyDgKb
47	Berne Hi-Way Hatchery	1.50	http://goo.gl/AFVLvw
48	Demler Enterprises	1.50	http://goo.gl/TXMnDa
49	Egg Innovations	1.40	http://goo.gl/141BkA
50	J.S. West & Company/JEM Eggs	1.40	http://goo.gl/YqL2Zv
51	Simpson's Eggs	1.30	http://goo.gl/i4bDYV
52	Mercer Landmark	1.28	http://goo.gl/UXigK3
53	Dakota Layers	1.25	http://goo.gl/Bf7qgv
54	Hertzfeld Poultry Farms	1.20	http://goo.gl/qrYj7i
55	Morning Fresh Farms	1.20	http://goo.gl/j2R3HL
56	Wilcox Farms	0.95	http://goo.gl/GHKmfl
57	Pearl Valley Eggs	0.92	http://goo.gl/n760PY
58	Hillside Poultry Farms	0.67	http://goo.gl/5RfONj
59	The Happy Egg Co.	0.60	https://goo.gl/J14XtS
60	Sunrise Farms LLC	0.53	http://goo.gl/HsMddz
61	SKS Enterprises	0.50	http://goo.gl/zRMHyI
62	Weber Family Farms	0.40	https://goo.gl/bEVnJe
63	Vital Farms	0.30	http://goo.gl/Rlfd6F
		Total	314.16

Layer numbers reported reflect the estimated number of hens housed on December 31, 2017.

1. Cal-Maine acquired the Happy Hen in 2017.

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

3. Prairie Star Markets is the combined egg production of Hoosier Pride, Rindler Poultry, Ross-Medford Farms and J Star Farms

Top 6 US egg producers

Cal-Maine Foods retains its place at the top of Egg Industry's Top Egg Company rankings with 40.10 million head of hens housed on December 31, 2017. In addition to being the largest egg producer in the U.S., Cal-Maine is also the largest egg producer in the world, according to WATT Global Media's Top Poultry Company rankings.

Rose Acre Farms, Hillandale Farms and Versova Holdings remain in the second, third and fourth positions in the rankings with 26.90, 16.73 and 16.40 million head of hens, respectively.

Daybreak Foods, with 12.80 million head of hens, rose to the fifth spot in this year's rankings from the sixth spot last year. Rembrandt Foods fell to sixth in the rankings since its hen numbers decreased from 14.7 million head on December 31, 2016, to 12.5 million head at the end of 2017.

The Top Egg Company Survey is conducted annually, and the results reported are composed of a combination 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, 2017. The report includes 63 companies with a collective 314.6 million hens. The December 22, 2017, USDA Chicken and Egg Report estimated there were 319.7 million table egg-laying hens in the U.S. on December 1, 2017.

Industry concentration

The level of concentration of the U.S. egg industry hasn't changed much in the past four

years. In the 2015 survey, the top five egg producers controlled the output of 34 percent of the hens reported in the Top Egg Company

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A number of excellent keynote speakers coming from different countries have lined-up to share with us their expertise and know-how.

Some novel sessions of major importance to the industry at this time have been added.

Very sincerely,

Nuhad J. Dagher, President MPN of WPSA

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Survey. In the 2018 survey, the top five egg producers controlled the output of 36 percent of the survey's hens. The amount of the country's hens housed by the top 10 egg producers has increased from 50 percent in 2015 to 53 percent in 2018.

Disaster losses in 2017

Fire and storms caused some significant losses of housing and birds for U.S. egg producers in 2017. On April 4, 2017, Opal Foods suffered significant losses because of a storm that hit its egg operations in Neosho, Missouri. The company lost three poultry houses to straight-line winds. An estimated 600,000

chickens inside those houses were also lost. It was estimated that it will cost about US\$2.4 million to replace the lost structures and an additional US\$4 million to replace the lost hens.

Hillandale Farms lost a barn and more than 100,000 hens in a fire that occurred July 1, 2017, at a company facility in Tyrone Township, Pennsylvania. Hi-Grade Egg Producers facilities near North Manchester, Indiana, were damaged by fire on October 2, 2017. More than 1 million of the 2.7 million hens on the site died in the egg farm fire. Hi-Grade Egg Producers is operated by Midwest Poultry Services, and the company has announced its intentions to rebuild. ■

THE TOP 10 EGG producers in the U.S. control 53 percent of the hens in the 2018 Top Egg Company Survey.

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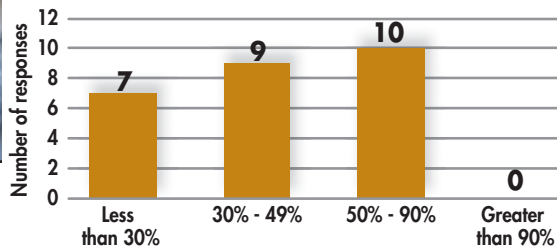
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Egg producer predictions for percentage of retail shell eggs sales that will be cage free in 2025



Source: 2018 Egg Industry magazine Top Egg Company Survey

More than half of U.S. egg producers who responded to the Top Egg Company Survey predict eggs from cage-free hens will make up less than half of the total U.S. retail shell egg purchases in 2025.

IN SPITE OF A great number of future cage-free egg and egg product purchase pledges, U.S. egg producers expect more than half of hens to be in cages in 2025.

Egg producers predict **cages won't go away** by 2025

US egg producers responding to the Top Egg Company Survey predict that more than half of US hens will still be housed in cages in 2025.

TERRENCE O'KEEFE

Most major shell egg retailers, restaurant chains, food service distributors and food manufacturers in the U.S. have pledged to switch all of their shell egg and egg products purchases to cage free by some future date, generally during or before 2025. The breakout for how hens were housed in the U.S. in 2017 was roughly 14 percent cage free (including organic), 85 percent in conventional cages and less than 1 percent in enriched cages.

As part of Egg Industry magazine's annual Top Egg Company Survey, egg producers were asked their opinion of how U.S. laying hens will be housed in 2025. Twenty-five egg producers, who house 144 million hens, answered this question. The average of the 25 predictions was that 52.6 percent of hens would be housed in con-



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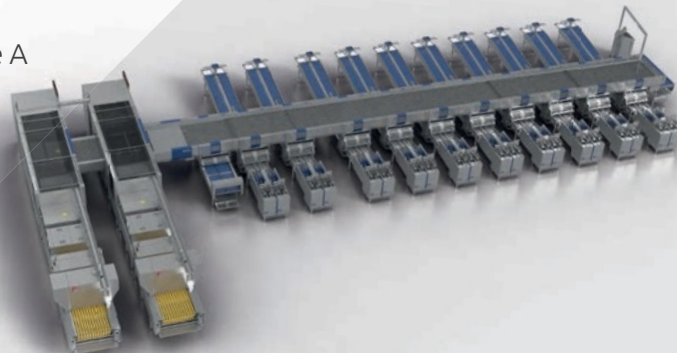
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ventional cages, 2 percent would be in enriched cages and 45.4 percent would be housed cage free. The predictions for the percentage of hens in conventional cage housing in 2025 range from 15 to 85 percent. The predictions for the percentage of U.S. hens that will be housed cage free in 2025 range from 14 to 80 percent, and the predictions for enriched-cage housing ranged from 0 to 10 percent.

Retailers not cage free by 2025

While most major shell egg retailers have pledged to be 100 percent cage free by 2025, some of these pledges contain language relating to “affordability and availability” of cage-free eggs. Egg producers were asked to select the statement about cage-free egg sales at retail in 2025 that most closely matches what they believe will happen. Twenty-six egg producers who house a total of 147 million hens answered this question. Zero egg producers agreed with the statement that more than 90 percent of egg sold at retail would be produced cage free. Ten egg producers agreed with the statement that between 50 and 90 percent of eggs sold at retail would be produced cage free. Sixteen of the respondents agreed with statements that said that less than half of eggs sold at retail in 2025 would be produced cage free, with seven predicting that less than 30 percent of eggs sold at retail in 2025 would be produced cage free.

Anticipated additional hen capacities added in 2018

Conventional cages*	2,600,000
Enriched cages	-
Cage-free housing	2,144,172
Total additional hen capacity	4,744,172
We plan to convert cage housing for this many hens to cage free in 2018	1,077,500

*Includes additional hens in complex that will no longer serve California market

U.S. egg producers responding to the Top Egg Company Survey intend to convert less cage housing capacity to cage-free in 2018 than they did in 2017.

Changes in US hen housing in 2017

Hen housing capacity added in new buildings in 2017	3,632,616
Hen capacity of houses that were re-caged in 2017	1,248,500
Hen capacity in cage houses converted to cage free in 2017	4,012,500
Which made cage-free housing for this many hens	2,671,672

For the cage housing converted to cage free in 2017, the net hen housing capacity loss was one-third.



Learn more about the world's top egg producing companies at: www.WATTAgNet.com/directories/80

US hen housing changes in 2017

Egg producers were asked how much hen housing capacity was added to their operations. The 27 companies that completed survey forms report that they added new buildings in 2017, which could house a total of 3.6 million hens. These companies also report that they re-caged existing houses, which could house about 1.25 million hens. U.S. egg producers who responded to the survey report that they converted cage housing for about 4 million hens to cage-free housing for about 2.7 million hens in 2017.

2018 hen housing plans

Egg producers responding to the Top Egg Company Survey report plans to add housing capacity for a total of about 4.7 million hens. Housing for just over 2.14 million cage-free hens is expected to be added. The additional capacity for 2.6 million cage-housed hens includes additional hens that will be added in existing housing that is being converted from production for the California market.

Survey respondents also report intentions to convert cage housing for about 1.1 million head of hens to cage free in 2018. ■

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More information about the companies found in Egg Industry's Top Egg Company Survey can be found by clicking on the company's name or visiting the top poultry company's database: www.WATTAgNet.com/directories/80

Top 20 US egg producers in 2018

Learn more about the companies WATT Global Media ranked as the 2018 top egg producers.

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 2017. More information about the companies can be found by clicking on the company's name or visiting the top poultry company's database.

Collectively, the top 20 companies account for 229.17 million birds.

1 **Cal-Maine Foods,** 40.1 million hens

The largest producer and marketer of shell eggs in the United States in fiscal 2017, sold approximately 1,031.1 million dozen shell eggs. Cal-Maine stated they thought that represented approximately 20 percent of domestic shell egg consumption. Cal-Maine had a total of approximately 40.1 million layers as of December 31, 2017.

Cal-Maine produces caged brown and white eggs, cage-free white and brown eggs, organic and free-range eggs, as well as specialty products. Most of their shell eggs are sold in the Southwestern, Southeastern, Midwestern and Mid-Atlantic regions of the U.S. Cal-Maine sells shell eggs to most American retailers.

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On March 3, 2017, the company announced it closed the acquisition of substantially all of the assets of Happy Hen and its affiliates, related to their commercial production, processing, distribution and sale of shell eggs business. In the deal, Cal-Maine acquired commercial

COLLECTIVELY, THE TOP 20 companies account for 229.17 million hens, or 73 percent of the survey total.

egg production and processing facilities with current capacity for about 350,000 layers and related distribution facilities located near Harwood and Wharton, Texas, according to a release.

Cal-Maine Foods ended its fourth quarter of its fiscal 2017, and its entire fiscal year, with a net loss, due to the pro-

longed effects of the U.S. avian influenza outbreak, among other factors. For the fiscal year, which ended on June 3, the company reported a net loss of \$74.3 million, compared with a net income of \$316 million the previous year.

On October 2, 2017, Cal-Maine Foods reported results for the first quarter of fiscal 2018, which ended September 2, 2017. Net sales for the first quarter of fiscal 2018 were US\$262.8 million, compared with US\$239.8 million for the prior-year period. The company reported a net loss of US\$16.0 million. During its earnings report for the first quarter of fiscal year 2018, Cal-Maine Foods CEO Dolph Baker said that, because the supply of cage-free eggs is not consistent with the demand, the company has adjusted its cage-free egg production levels in line with the current customer demand. Baker added that Cal-Maine Foods was well positioned to increase its cage-free egg production capacity as demand trends change. According to Baker, the cage-free egg market

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is an important area of focus for the company's growth strategy, and it has invested in its operations and capacity to provide a strong supply of cage-free eggs.

2 **Rose Acre Farms,** 26.9 million hens

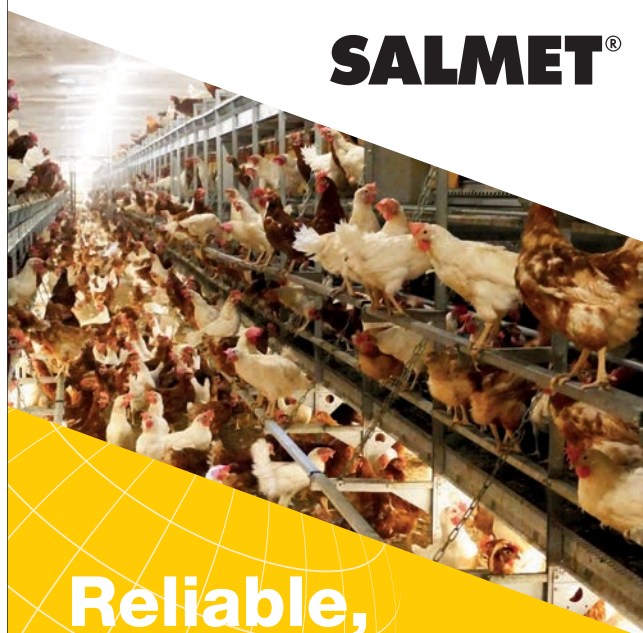
Rose Acre Farms is a family-owned egg operation that claims the spot of second largest U.S. egg producer. As of December 31, 2017, the company had 26.9 million layers in its flock. In addition to table eggs, Rose Acre Farms produces a variety of egg products ranging from liquid eggs and dried eggs to egg protein powder.

Rose Acre Farms' new 27,000-square-foot, US\$5 million corporate office in Seymour, Indiana, opened in June 2017. The new building resembles a chicken house and has offices for 80 employees on the east and west sides of the building.

In August 2017, Chips Everhart, site selector for Rose Acre Farms, spoke at the Western Arizona Roundtable, hosted by the Arizona Association for Economic Development, about a new egg-producing facility in La Paz County, south of the community of Bouse. Ground was broken on the facility near Bouse in June 2015. Plans for the farm included housing for about 3 million hens. The company also revealed plans for a pullet farm, a rail spur and a feed milling operation in La Paz County.

In October, Rose Acre Farms announced that it was at least temporarily discontinuing the addition of cage-free laying systems, or as CEO Marcus Rust put it, the company is "shutting [its] construction program down." With all major grocery chains and a large percentage of restaurant and foodservice companies committing to only purchase cage-free eggs by a certain date, many U.S. egg producers, including Rose Acre Farms, started transitioning their farms to using cage-free laying systems. Rose Acre Farms, over the past four years, spent about US\$250 million on cage-free operations and now has about 20 percent of its hens in cage-free housing, Bloomberg reported.

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3 Hillandale Farms,
16.73 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. The company has 16.73 layers and creates products. 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 built new, cage-free houses in Hicksville, Ohio, and Bozrah, Connecticut.

Hillandale Farms lost a barn and more than 100,000 hens in a fire that occurred July 1, 2017, at a Hillandale Facility in Tyrone Township, Pennsylvania.

4 Versova Holdings,
16.4 million hens

Versova is a family-owned company, formed in April 2016, and is one of the largest egg producers in the U.S. Versova combines day-to-day operations of egg producers Centrum Valley Farms LLP, Trillium Farm Holdings LLC and Iowa Cage-free LLP. Centrum Valley, Trillium and Iowa Cage-free will continue to exist independently. As of December 31, 2017, the company's layer flock included 16.4 million laying hens. They produce caged and cage-free white and brown eggs, along with liquid egg products. Versova serves as a holding company with a new management team overseeing business functions of Centrum, Trillium and Iowa Cage-free. It handles marketing, customer relationships, information technology, operations, feed man-



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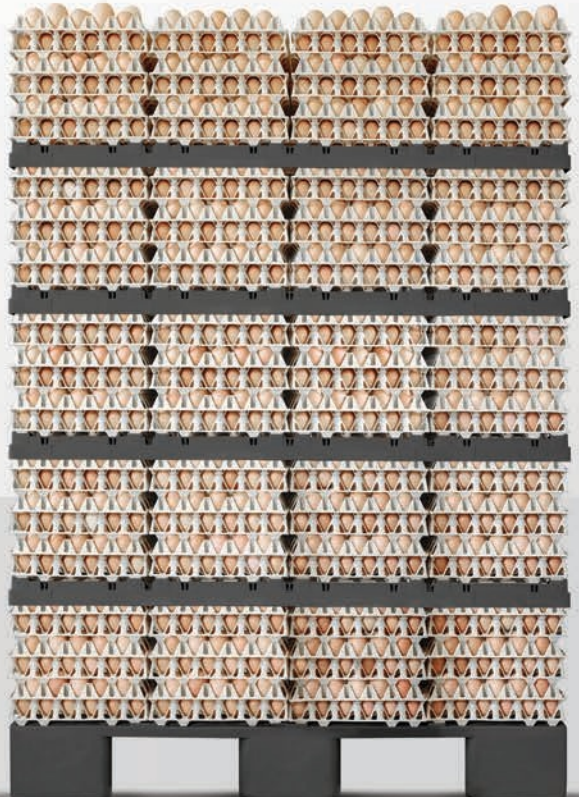
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agement, human resources and finance. This operation is owned by farm families with more than six generations of knowledge in egg production; those families are the Deans, the Hennings and the Boomsma's.

5 Daybreak Foods, 12.8 million hens

Daybreak Foods is privately held and is involved in shell egg and egg products production. Its layer flock includes 12.8 million hens. It produces conventional white eggs and liquid egg products. In November, the company announced at a town meeting that it was moving to a cage-free environment at its Creekwood site. The facility is going through the permitting process to upgrade its capacity. The company bought adjacent property and is looking to tear down the current facility and erect a larger plant.

6 Rembrandt Enterprises, 12.5 million hens

Rembrandt Enterprises, doing business as Rembrandt Foods, is privately held and focuses on producing egg products for the foodservice and ingredients industries. As of December 31, 2017, the company's layer flock included 12.5 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. In June 2017, the company announced the launch of a new product known as REMPRO, an egg white high-protein product. It is intended to be ideal for sports and nutritional beverages. Rembrandt produces consumer and institutional or bulk packaged egg products.

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7 Michael Foods, 12.18 million hens

Michael Foods 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 and is owned by Post Holdings Inc., which purchased it from GS Capital Partners for US\$2.45 billion in 2014. In 2015, Post completed a US\$90 million acquisition of Willamette Egg Farms, at the time the 30th largest egg producer in the U.S. As of December 31, 2017, its layer flock included 12.18 million birds. For fiscal year 2017, net sales were US\$2,116.2 million, a decline of 3.1 percent, or \$68.5 million, over the reported prior year. Michael Foods' egg sales for the fourth quarter were "relatively flat," although the volumes increased by about 3.5 percent.

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. Unlike Cal-Maine Foods and Rose Acre Farms, which have announced they have pulled back on cage-free egg production because the demand has not been in line with the supply, Post Holdings CEO Robert V. Vitale said he feels "very comfortable" with the way its Michael Foods subsidiary is matching the production of cage-free egg products with the demand. "We are moving along with our customers and trying to be supportive of their overall initiatives in this area, so our capacity is very nicely matched against the demands," Vitale said while speaking during a November 17 conference call.

In December 2016, Post announced it would pay a US\$75 million settlement to settle an egg-related class action lawsuit filed in 2008. In November 2017, a federal judge accepted Michael Foods' settlement. The lawsuit alleged that the leading egg producers in the United States

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conspired to use new welfare standards that included uniform hen spacing and housing standards to artificially reduce egg supply and raise egg prices. Michael Foods and Post Holdings agreed to settle, but stated that the settlement is not an admission of guilt. The payment will end Michael's involvement in the case.

8 **Center Fresh Group,** 9.7 million hens

Center Fresh Group was founded 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, 2017, the company's layer flock included 9.7 million hens. Center Fresh produces conventionally raised and cage-free eggs as well as liquid egg products.

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, 2017, the company's layer flock included 9.5 million hens. The company produces conventional white eggs, cage-free eggs, free-range eggs, organic 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, 2017, the company's layer flock included 9.4 million laying hens.

11 **Herbruck's Poultry Ranch,** 8.4 million hens

Herbruck's Poultry Ranch Inc. is Michigan's largest egg farm. 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.

As of December 31, the company's layer flock included 8.4 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.

As of October 2017, Herbruck's Poultry Ranch was expanding its egg farm in Ionia County, Michigan, creating 33 jobs and US\$16.3 million in capital investment. Herbruck's plans to construct three cage-free pullet-rearing facilities to raise 2.5 million young hens annually in Ionia County. Also in April 2016, it announced plans to expand an operation in Mercersburg, Pennsylvania, by adding poultry barns to house cage-free and organic laying hens. In December 2016, a local newspaper in Chambersburg, Pennsylvania, reported the company was seeking state permits to build a US\$90 million cage-free operation including eight barns that could house as many as 2.4 million hens. In December 2017, the company announced it could begin construction on the farm in Mercersburg, Pennsylvania, as soon as March 2018.

12 **Weaver Brothers,** 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 options and employs 350. As of December 31, 2017, the company's layer flock included 8 million hens, up from 7.8 million last year. The 200,000-hen increase was in cage-free hens. Weaver Eggs provides a variety of egg and dairy products that are produced under a variety of recognized brands.



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13 **Hickman's Egg Ranch,** 7.35 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-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, 2017, the company's layer flock included 7.35 million hens.

Egg Industry visited Hickman's operations in Arizona in February 2017 and sat down with the Hickman family to discuss the 73-year-old family business' past, present and future. They predicted that due to the egg market's rapid shift to cage-free production, Hickman's Egg Ranch will be 80 percent cage-free production within four years.

In September 2017, the company said that not only was it working to meet consumer demands by generating more cage-free egg products, but is also working to branch outside the company's traditional role of farming into the packaging realm to work with a California recycler to develop 100 percent-recycled egg cartons.

14 **Fremont Farms of Iowa,** 7.3 million hens

Fremont Farms of Iowa is a producer and processor of liquid egg products. As of December 31, 2017, it had 7.3 million laying hens.

15 **Sparboe Farms,** 6.1 million hens

Started in 1954, Sparboe Farms began as a day-old chick company and has grown over the past 60 years to a major shell egg producer and marketer in the U.S. Its subsidiary Sparboe Foods provides egg products. The company also owns Agri-Tech, which produces premixes for lower feed cost. As of December 31, 2017, its layer flock included about 6.1 million hens. It offers a broad platform of white and specialty eggs in a variety of packaging options, along with vegetarian-fed brown eggs, cage-free brown eggs and organic eggs.



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16 ISE America, 6 million hens

ISE America is an integrated egg laying and production operation. As of December 31, 2017, it has nearly 6 million layers, as well as its own feed mill and shell egg processing plants. It also performs further egg processing, including fresh frozen eggs, liquid eggs and hard-cooked eggs. The company is a subsidiary of ISE Inc., headquartered in Japan. ISE Inc. entered the chicken genetics and breeding industries in Japan in 1912.

17 Kreider Farms, 5.2 million hens

Kreider Farms supplies shell eggs to supermarkets and wholesalers in the northeastern U.S. 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, 2017, the company's layer flock included 5.2 million hens. Kreider produces white and brown eggs, conventionally raised and cage-free eggs, organic eggs and nutritionally enhanced eggs.

SIX OF THE 10 largest egg companies in the world are headquartered in the U.S.

18 Opal Foods, 5.18 million hens

Opal Foods, an entity created by Visalia, California-based private equity fund AGR Partners, was launched in May 2014 with the acquisition of Moark's Midwest operations. As of December 31, 2017, its layer flock included 5.18 million hens.

On April 4, 2017, Opal Foods suffered significant losses because of a storm that hit its egg operations in Neosho, Missouri. The company lost three poultry houses to straight-line winds. An estimated 600,000 chickens inside those houses were also lost, according to a Nextar

Broadcasting report. It was estimated that it will cost about US\$2.4 million to replace the lost structures and an additional US\$4 million to replace the lost hens.

In September 2017, the company received the Grow Neosho expansion award in honor of its new corporate headquarters.

"Opal Foods' new corporate headquarters represents an investment of over US\$1.4 million dollars," Brock Peterson, president, Opal Foods, said to the Neosho Daily. "This investment has created a central headquarters of over 17,000 square feet to house the management and operations teams, which oversee multiple egg farm operations in Missouri and Colorado."

The company has 350 employees, most of which are in the Neosho area. The company specializes in all-natural, organic, cage-free and all-natural eggs with omega 3s. Opal Foods also provides Land O' Lakes with all-natural brown eggs.

19 Gemperle Farms, 4.9 million hens

Gemperle Farms produces all varieties of eggs including organic, cage-free, omega 3, cage-free fertile and brown and white enriched colony barn eggs. All of its eggs are produced without hormones and antibiotics. As of December 31, 2017, the company's layer flock included 4.9 million hens. The Stanislaus County, California, farm announced the firm's conversion to 100 percent cage-free egg production will be accelerated and completed by 2023. The company previously had committed to completing the conversion by 2024 in an announcement last year.

20 Sunrise Farms, 4.5 million hens

Sunrise Farms Inc. is an Iowa egg producer owned by Sonstegard Foods. The parent company produces and markets shell eggs as well as liquid, frozen and powdered egg products. Sonstegard Food Group is third-generation family-owned and has operations in six states. As of December 31, 2017, its layer flock included 4.5 million hens. ■

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Midwest Poultry Federation Convention moves to Minneapolis

FAST FACTS:

WHEN: March 13-15, 2018

WHERE: Minneapolis Convention Center, Minneapolis, Minnesota

Workshop topics:

- Simmering issues
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- Turkey breeder
- Organic/specialty poultry production
- Pullet and layer health
- Meat and egg processing
- Turkey grower
- Pullet and layer egg production
- Turkey health

The 2018 Midwest Poultry Federation (MPF) Convention features a new location and schedule, giving attendees more time to visit the exhibit hall and education workshops as well as offering new learning opportunities and networking events. The conven-

tion's goal is to offer cutting-edge information to attendees through a balanced offering of exhibits and educational workshops. The MPF Convention is a great place to learn about products, services and technologies that are vital to producers' success. ■

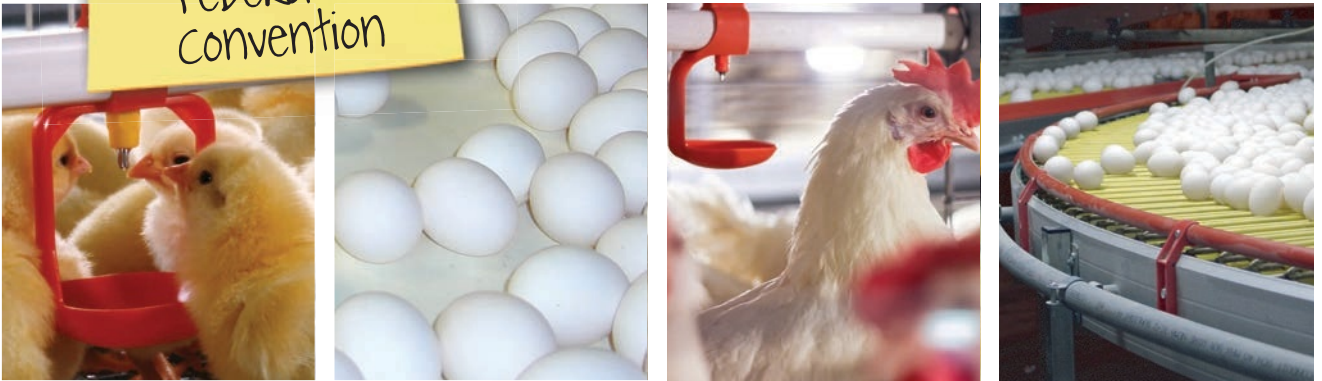
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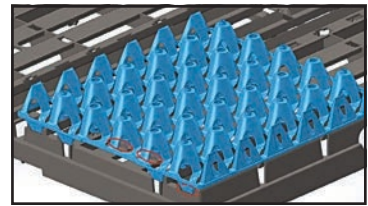


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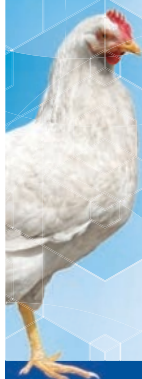
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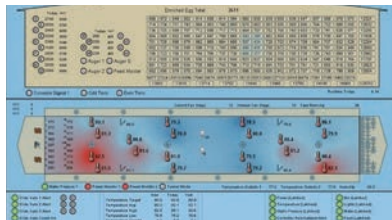
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PRODUCT NEWS

FANCOM AURA 37 CLIMATE CONTROLLER

Fancom AURA 37 is a simple controller for mechanical ventilation in a small poultry house up to approximately 25,000 birds. The main features of the AURA 37 are the clear

displays with simple navigation. Easy-to-understand symbols give users a clear overview of the situation in the house at all times, and quick intervention is possible in the event of any deviations.

www.fancom.com

SAEPLAST DP40FV ANTI-SKID PALLET

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www.saeplast.com

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