

Egg Industry

News for the Egg Industry Worldwide

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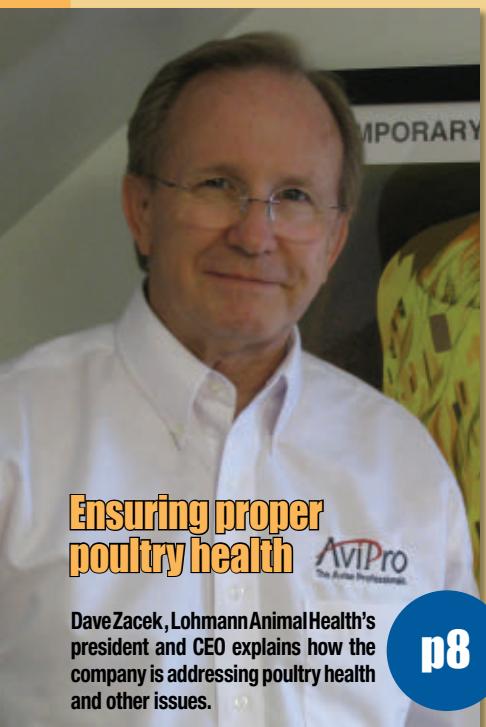
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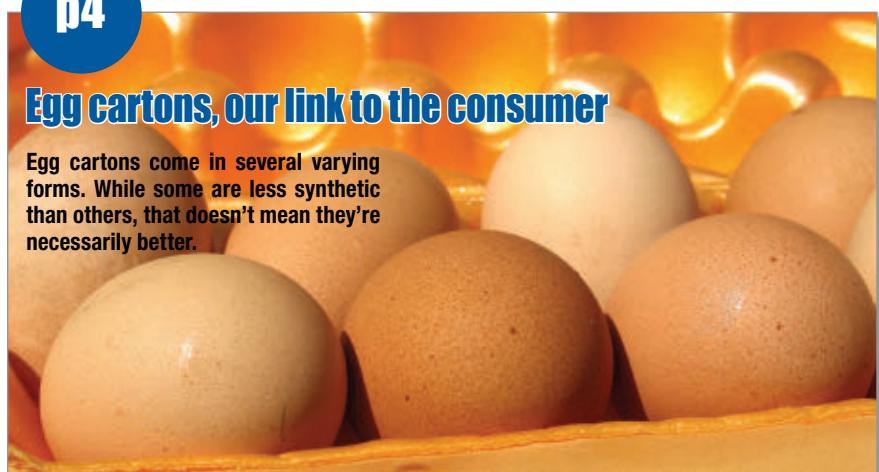
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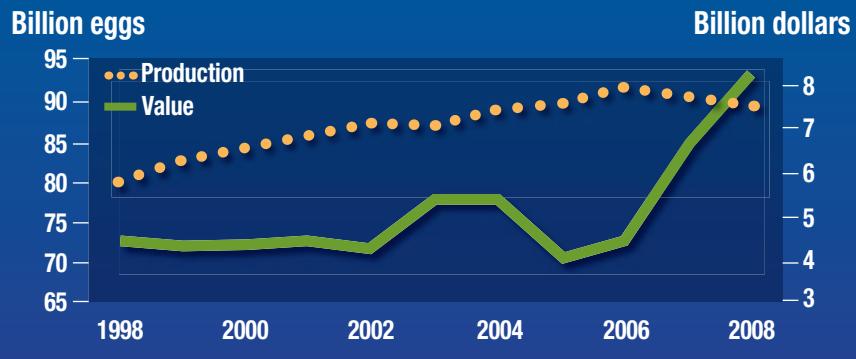
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Egg cartons, our link to the consumer

Egg cartons come in several varying forms. While some are less synthetic than others, that doesn't mean they're necessarily better.



All egg production and value of production United States, 1998-2008

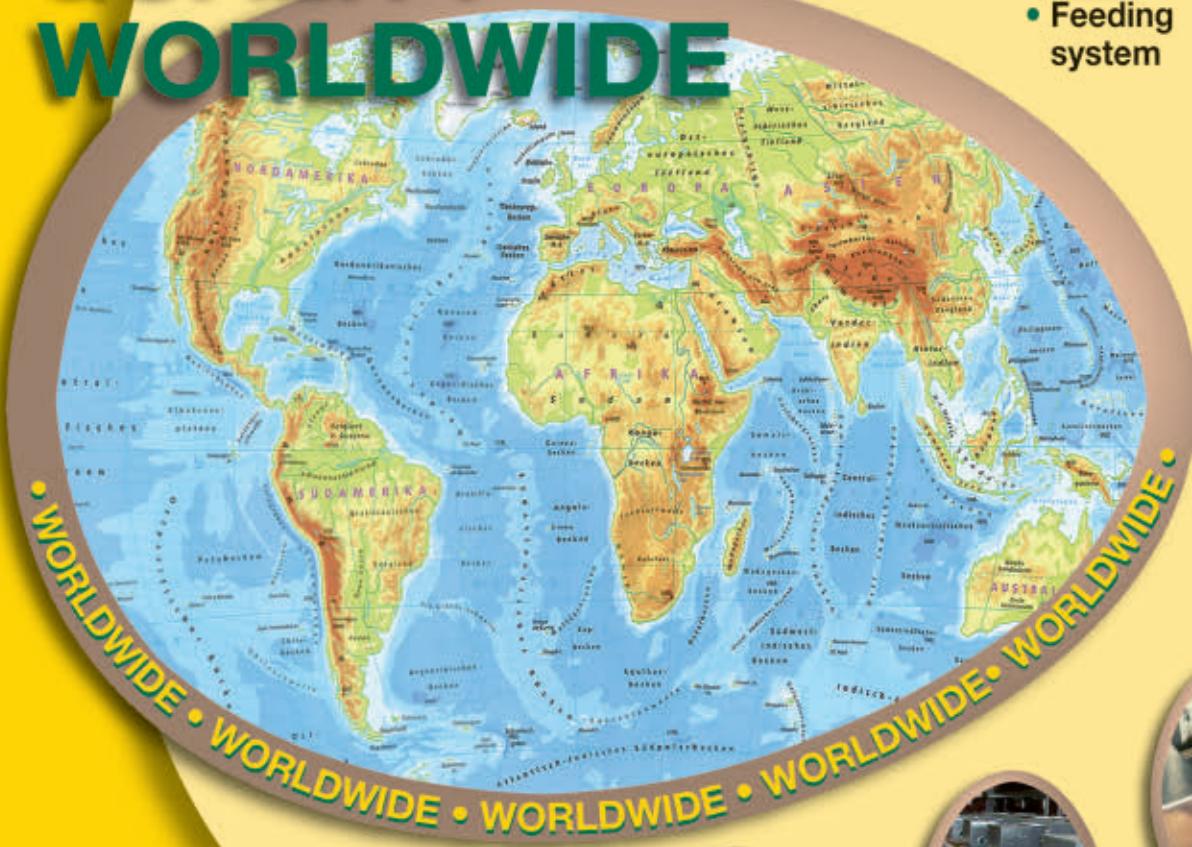


Egg production has greatly increased within the past 10 years within the United States

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• Cage floor



• Egg belt



• Manure drying system



• Egg collecting system



EDITORIAL

WITH DR. SIMON SHANE

Preparing ourselves for Q4

During the past month, we have observed a welcome increase in unit revenue which bodes well for the fourth quarter of 2009. With stable feed prices, albeit unseasonably high soybean meal cost in relation to corn, most producers should be in a more favorable position than during the weeks following Easter.

This edition of *Egg Industry* reviews egg cartons which are available in the U.S. with reference to their respective advantages, application

and cost.

An interview with Dave Zacek of Lohmann Animal Health provides an insight into vaccines and their contribution to productivity of our flocks.

A new interactive feature involving monthly mini-case studies has been introduced which it is hoped will generate some responses and interaction among readers.

As we move into Fall, it is not too early to consider winterizing. While planning modified ventilation programs, sealing houses and dietary formulations for winter, we still have at least one month of moderate weather which is generally beneficial to production.

Egg Industry wishes our readers a productive and disease-free Fall.

Simon

sshane@nc.rr.com



Simon Shane

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Egg cartons, our link with the consumer

Egg cartons come in several varying forms. While some are less synthetic than others, that doesn't mean they're necessarily better.

The U.S. egg industry uses the equivalent of approximately four billion 12-egg cartons every year, assuming a constantly producing flock of 265 million hens at an average hen week production of 76% and with 2/3 of all production marketed in shell form. Allowing a nominal value of 12 cents per 12-egg carton or equivalent, annual expenditure on packaging for shell eggs approaches \$500 million. Cartons may be constructed of cellulose fiber, polystyrene foam, PET [polyethylene terephthalate] transparent polymer or PLA [Polylactic acid] potentially-biodegradable material.

Egg cartons represent the link between producers and consumers. Acceptability of cartons by consumers is traditionally based on the ability to inspect product for shell integrity and cleanliness at point of sale. Even transparent PET cartons, which show at least 30% of the shell surface, are opened to confirm acceptability. The tab, or thermally sealed cartons as used in the EU, would probably be rejected by U.S. consumers. This reality presumes an effective molded closure which allows cartons to be



Fiber cartons require over twice as many materials to make as polystyrene cartons.

dium to Jumbo grades and sufficient rigidity to withstand transport in cardboard boxes, metal baskets or racks.

The significant emerging issue in selecting cartons relates to consumer perceptions of sustainability. Cartons which are manufactured

either completely or partially from recycled materials are favored by environmentally-conscious buyers and consumers. In addition the ability to recycle used cartons is ranked high as an attribute of acceptability.

There is a perception that fiber cartons are more environmentally friendly than polystyrene foam or PET. Generally, U.S. consumers do not understand the triangle recycle codes and often are unaware of the environmental fate of their cartons.

A study conducted by Franklin Associates LCI in 2008 demonstrated that polystyrene foam cartons which comprise

85%-90% air and 10%-15% polymer require 50% less energy to manufacture compared to fiber cartons. The materials input required for fiber cartons is approximately 2.5 times that of polystyrene foam which has a much lower solid waste component during fabrication. Although there are questions as to the biodegradability of polystyrene if it is not recycled, studies have shown that all plastic food packaging combined represents less than 1% of the contents of municipal waste dumps.

Clear cartons constructed of PET frequently contain a high component of recycled material. The basic thermal plastic material comprises polymerized ethylene and terephthalate which can be formed into a required shape in heated molds. Clarity is derived from rapid cooling to form an amorphous solid. All PET products bear a #1 in the triangle recycle symbol.

Polylactic acid cartons are manufactured using a condensation reaction process which polymerises lactic acid monomers. These are derived by fermenting carbohydrate components, principally starch, contained in corn, beets or potatoes. By adjusting the manufacturing temperature and by selecting components in the formula, the proportion of D- and L- lactides influence polymer morphology from amorphous to crystalline as used in thermo-formed egg cartons. The degradation of PLA requires composting for at least 10 consecutive days at a temperature of 140 F to initiate hydrolysis of poly(lactide) units. The duration of degradation from deposit to total destruction in municipal and commercial composters may range from six months to five years depending on heat, pH, moisture and the composition of the substrate which supports the aerobic microbial flora responsible for ongoing hydrolysis to carbon dioxide and water.

Polystyrene foam containers

Polystyrene foam has been extensively used for food products since introduction in the ear-

Manufacturers' Web sites

Advance Engineering

www.adveng.net

Clearview Cartons

www.clearviewcartons.com

Dolco Packaging

www.tekni-plex.com

Hartmann North America

www.hartmann-packaging.com

inTech

www.intechllc.net

Interplast Packaging

www.keyespckaging.com

Pactiv Corp.

www.paktiv.com

opened at point of sale to inspect the contents followed by secure closing before transfer to the basket or trolley. Practical aspects relating to the design of cartons include compatibility with packers and stampers, sizing of the cells and the thickness of partitions to protect eggs from Me-

ly 1940's and containers made from it have relatively high strength for weight. The foam material provides adequate cushioning for eggs, provided that the cells and dividers are designed to protect eggs of a given grade. As with any carton, over-grading during packing will contribute to shell damage either by vertical crushing or contact between adjacent eggs usually in the end cells. Polystyrene packs can be manufactured in a range of colors corresponding to grade for easy on-shelf identification. Artwork can be applied directly onto the top and undersurface of the lid using mono- or multicolor printing which requires high precision to ensure acceptable register and clarity. It may take up to three days for in-line eggs within a foam pack to attain 42-45 F after transfer from the packing room to the cold store. In contrast, thermal abuse during transport and handling and subsequent to purchase is minimized since eggs within a foam carton are well protected from external heat.

Fiber cartons

Molded fiber cartons are produced by a number of companies in the U.S., as the process involved does not require sophisticated



Polystyrene foam cartons provide adequate cushioning and insulation for eggs.

equipment, technology or scale of production. Hartmann North America, a subsidiary of Brodrene-Hartmann A/S of Denmark, markets a full range of fiber cartons and keys trays. Fiber cartons usually contain a high content of recycled materials and are regarded by consumers as being "environmentally friendly". Hartmann has adopted a STEP approach to manufacture. This acronym is derived from "Sustainability Tools for the Entire Production Chain". Engineers have analyzed each stage of the production process and have optimized energy utilization. Molded fiber cartons and trays can be recycled subject to separation at

the waste receiving center. Fiber cartons are biodegradable in municipal waste dumps over various periods of time depending on conditions which promote microbial action.

Pactiv markets a Master Vue range of 6-, 12- and 18-egg fiber cartons which allow partial inspection of eggs through a slot in the lid. Molded fiber flats are available in 30- and 36-egg configurations which are inserted into a light cardboard printed sleeve. The company will soon launch Edge precision molded fiber cartons manufactured from 100% reclaimed paper.

The protective capability of molded cartons

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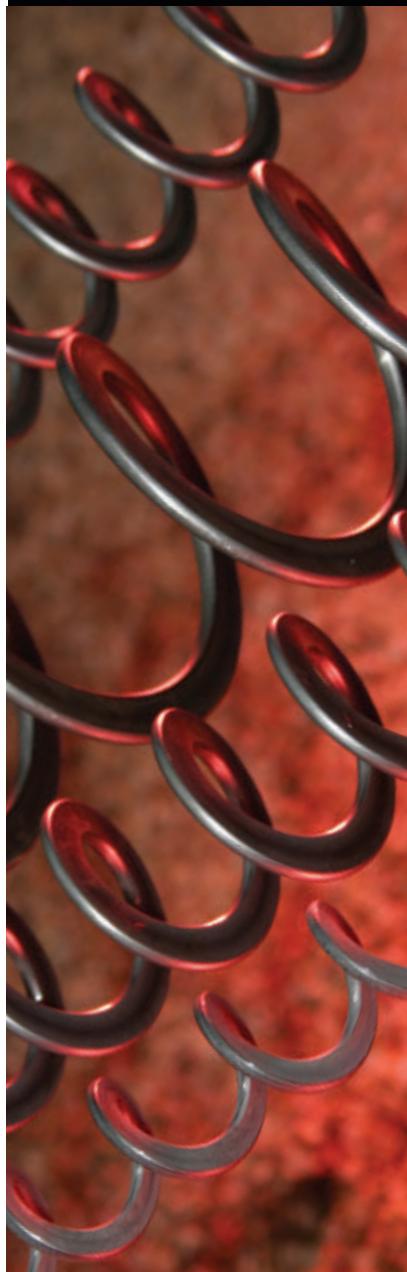
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| Egg cartons, our link with the consumer |

depends on the quality of the material used for their fabrication. Soft pulp products used primarily for low-cost generic eggs may contribute to breakage with rough handling especially when exposed to water or stored in an environment with high humidity for prolonged periods. In contrast, rigid molded cartons provide protection equivalent to PET cartons. Pulp cartons offer limited opportunities for printing beyond brand identification and the statutory nutritional information on the underside of the lid.

Hartmann, Pactiv and other suppliers of quality fiber cartons offer graphic design assistance to clients to prepare labels. Their service extends to creating brand names and logos and may also include point of sale material and vehicle graphics as an integrated support function.

PET cartons

Egg cartons constructed of PET are available in tri-fold or bi-fold configurations and can have cells sized to accommodate either Large or Extra Large grades. In addition to cartons, the company Interplast produces a 30-egg PET cover which is used over a fiber tray for club store and supermarket applications.

Engineers at Pactiv, a company manufacturing a wide range of plastic containers, have evaluated manufacturing programs and pro-

cesses in various plants and have conducted Life Cycle Inventory Studies (LCISs) on products to reduce energy utilization, emissions and waste. The Pactiv range includes PET bi-folds in various configurations and a capper for fiber 30-egg trays.

InTech of Florida imports and distributes a PET bi-fold carton with effective closure and ventilation features. Their product incorporates an advanced design for cells to support eggs and incorporates effective and precise closing buttons. Cartons are designed to withstand a uniform weight of twenty pounds across the top surface without deformation.

Advance Engineering is a recent entrant to the market for egg cartons. Their tri-fold carton contains 50% recycled material and was designed in accordance with the requirements of a leading producer of specialty eggs. Features include strength and durability, and a cell which cushions and elevates the egg to provide optimal support during transport.

Both bi-fold and tri-fold PET containers require double-sided labels which are inserted into the underside of the lid. Because PET is transparent, detailed artwork can be designed and printed to produce a more aesthetic package visible on the shelf. Detailed nutritional data, recipes and promotional text can be imprinted on the underside of the lid with greater clarity and multicolor capability than with

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polystyrene foam. Most suppliers of PET cartons generally have graphic design capability to support their sales activities.

The bottom line

Cartons are as important to the egg industry as corn as they facilitate mass marketing of a fragile food product. Sufficient competition exists among manufacturers to ensure competitive pricing but substantial differentials are based on volume of purchase. Relatively expensive tri-fold PET cartons are compatible with specialty and branded eggs since their higher cost can be justified by price of the total product. Ironically, many consumers purchasing the most expensive organic eggs favor molded fiber cartons based on their perceptions of sustainability and biodegradability. Foam cartons offer the greatest range of attributes including protection, insulation, printability and color corresponding to grade.

Future advances will include higher levels of sustainability, design changes which can improve on-shelf quality and eye appeal. Both the industry and carton manufacturers must become more aggressive in their informational programs regarding sustainability. Inappropriate claims and distortions of attributes regarding biodegradability and energy requirements will confuse consumers and will be self-defeating. The egg industry will have to respond to the demands of the major chains, club stores and consumers for environmentally friendly packaging. Perception is sadly the reality. There is an evident lack of appreciation for the beneficial characteristics of both PET and polystyrene foam and an unrealistic anticipation of the benefits of PLA given the restraints of commercial composting. ■

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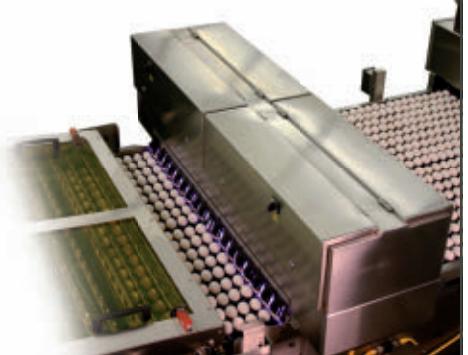


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Ensuring proper poultry health

Lohmann Animal Health's president and CEO explains how the company is addressing poultry health and other issues.

Dave Zacek has been involved in the U.S. poultry industry since 1962, when he managed a broiler producing company on the West coast. He has been involved with poultry biologics and pharmaceuticals since 1965 in progressively more demanding positions of responsibility. He resides in Maine where he is president and CEO of Lohmann Animal Health.

Egg Industry: *Dave, please share with us your background and extensive participation in the U.S. poultry industry.*

Dave Zacek: In 1962, I managed Randall's Poultry, at that time the largest broiler integration in Washington state. In 1965, I moved into selling vaccine, feed additives

and pharmaceuticals for the industry leader Salsbury Laboratories located in Charles City, Iowa, covering the mid-West and the West coast. In 1985, I was appointed as the poultry business director of Salsbury Laboratories. When the company was acquired by Solvay



Dave Zacek

Animal Health in 1990, I moved to Minneapolis in the same position, responsible for all functions of the poultry business worldwide. In 1995, following the sale of the division by Solvay, I became President of Megan Health which was established as an R&D company with a strong focus on molecular biology. The lead poultry product was Megan Vac which is still used to protect flocks against *Salmonella*. In 2000, I was appointed as president of Lohmann Animal Health International. This required efforts to consolidate and restructure Vineyard Laboratories, Maine Biological Lab-

oratories and incorporation of the TAD brand into the Lohmann AviPro product range for worldwide distribution.

EI: *What challenges currently confront the U.S. biologics industry?*

DZ: Market demands are changing from strictly prevention of disease to incorporate food safety. We must appreciate that public perceptions of intensive animal production are not entirely favorable. Our industry mindset must adapt to current realities in order to progress.

EI: *What changes have you observed over your 40 year career in the animal health industry?*

DZ: Big Pharma has spent the last three decades shedding veterinary businesses including poultry biologics manufacturers. The trend now is back to ownership by the major multinationals. This bodes well for the availability of funds for R&D and future expansion. The downside is that our industry must show a return to corporate managers and shareholders who have little concept of the scope and competitiveness of the poultry industry. This could present challenges relating to resource allocation and recognition.

EI: *Are there any benefits from the trend towards consolidation?*

DZ: Increased availability of resources and personnel will speed the development of a wider range of genetically-engineered vaccines. This will improve safety of biologics compared to conventional live attenuated vaccines which create problems of reversion and emergence of variants. New products will hopefully enhance immunity.

EI: *What challenges face the biologics industry through regulation?*

DZ: Currently we have two global regulatory controllers, the USDA and the EU GMP system. While the products controlled under both regulatory regimes are difficult to differentiate in terms of type and function, the processes by which they are manufactured differ significantly. Despite years of attempting to harmonize regulations we have made little progress in two decades. This inhibits access to potentially beneficial products for the world's poultry producers and the cost of developing avian vaccines is increased as a result of complying with two sets of standards. Many in the industry consider the differences are primarily barriers to trade and cannot be justified by either science or technology.

EI: *What trends have you observed in vaccination technology over the past twenty years?*

DZ: During the past two decades, aerosol and *in ovo* application techniques have been successfully introduced to the poultry industry, especially for broiler production. Mass application of effective vaccines is now a reality. We should be able to simultaneously administer multiple vaccines which stimulate and maintain immunity to prevent re-handling flocks.

EI: *How is your company responding to escalation in production costs?*

DZ: Recently we have experienced significant increases in the costs of SPF eggs, sterile oil, packaging materials, energy and transport costs. We have attempted to raise our average selling prices by addressing specific segments of our market. We have withdrawn from countries with extreme competition or historically low prices. We have deleted vaccines from our range that generated low returns or which represent small volumes.

EI: You noted trends towards consolidation previously. What are the advantages of ownership by a multinational?

DZ: Higher critical mass usually means more economical production. Larger enterprises support higher R&D budgets and provide access to a pool of highly trained specialists. Large companies can support relatively higher R&D budgets especially long-range projects and have more sophisticated marketing capabilities.

EI: What are the disadvantages?

DZ: A poultry biologics subsidiary may be in a disadvantageous position within a large multinational company since it must compete with more profitable and faster growing companion animal businesses. Poultry biologics subsidiaries are expected to generate cash in the short term. These funds are frequently diverted into the development of products for companion animals which have a higher potential market demand and profitability.

EI: What future products do you envision?

DZ: We will see more bacterial-based recombinant products for food safety. These may include effective vaccines to suppress multiple stains of *Salmonella*, *Campylobacter* and *E. coli*. We may also see a new range of recombinant bacterial vaccines to prevent pasteurellosis, colibacillosis and mycoplasmosis. Recombinant viral vaccines are undergoing refinement and improvement. Now that some products have been introduced onto the market, it is expected that the range will expand. We will also see improvement in vaccine production using cell lines to replace SPF eggs. Perhaps we will make greater use of bioreactors for faster and more efficient vaccine production.

EI: What is your long-term vision for the biologics industry in the U.S.?

DZ: Most significant disease challenges have been successfully addressed by existing biologics. The future will see refinement and improvement in safety, efficacy and production cost. The growth area for avian vaccines will shift from disease con-

trol to food safety. Coccidiosis vaccines will gain market share at the expense of feed additive synthetics and ionophores. More effective control of clostridial enterotoxicities including necrotic enteritis and botulism will facilitate adoption of both conventional and precocious oocyst vaccines.

EI: Is there any message that you would like to convey to our readers?

DZ: Many participants in the present poultry biologics businesses have recently been subject to acquisition or are take-over candidates in the near future. There is a high degree of anxiety based on job tenure, reporting responsibilities and changes in corporate culture. If our specialists in vaccine development, production and marketing have the courage to remain in the industry and adapt to new regimes, they will prosper. In many cases, fear will be replaced by relief as resources become available and greater support is provided within more efficient corporate structures.

EI: Thank you.

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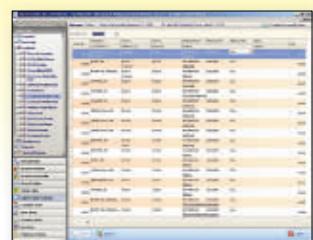
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Finding the value of the egg

Statistics from UC Poultry specialist emeritus Don Bell explore specific industry information.

Flocks statistics for June 2009, circulated on August 15th included the following key egg industry values:

- ✓ Est. 2009 year-end complement = 277.2 million table egg layers
- ✓ July 1, 2009 hen complement = 276.2 million producing birds (excludes hens in molt)
- ✓ Proportion of U.S. flock undergoing molt on July 1st = 3.4%
- ✓ Proportion of U.S. flock completed molt July 1st = 20.2%
- ✓ Total table eggs produced in June = 6,285 million
- ✓ Projected 2009 total production = 76.7 billion eggs or 6.4 billion dozen or 212.9 million cases
- ✓ Six month average U.S. hen week production = 75.3%

- ✓ Average U.S. cost of production in July 2009 = 57.5¢
- ✓ Average mid-month egg price (c/doz) mid-July = 55.9¢
- ✓ Proportion of U.S. eggs broken through June 2009 = 30.8%
- ✓ 2009 estimate of per capita egg consumption = 249.5
- ✓ Exports of table eggs in shell form, January-May 2009 = 0.89% of U.S. production
- ✓ Export of egg products January-May 2009 = 1.36% of U.S. production
- ✓ Proportion of exports in relation to total U.S. production January-May 2009 2.25%
- ✓ U.S. average feed cost January-July 2009 \$207.40/ton = 59.4¢/doz

The major trends in comparing current

values to 2008 include:

- ✓ 19% decrease in average U.S. feed cost
- ✓ 13.5% decrease in feed cost/dozen
- ✓ 2.4% decrease in shell eggs broken under Federal inspection YTD
- ✓ 37.6% decline in average monthly egg price over seven months, YTD (98.5¢/doz to 60.9¢/doz)
- ✓ 1.3% increase in average U.S. rate of lay from 74.3% to 75.3% over six months of 2009
- ✓ Virtually static average table egg flock comparing the average with the first six months of 2008 and 2009 respectively

The full report can be obtained from Don Bell at don.bell@ucr.edu.

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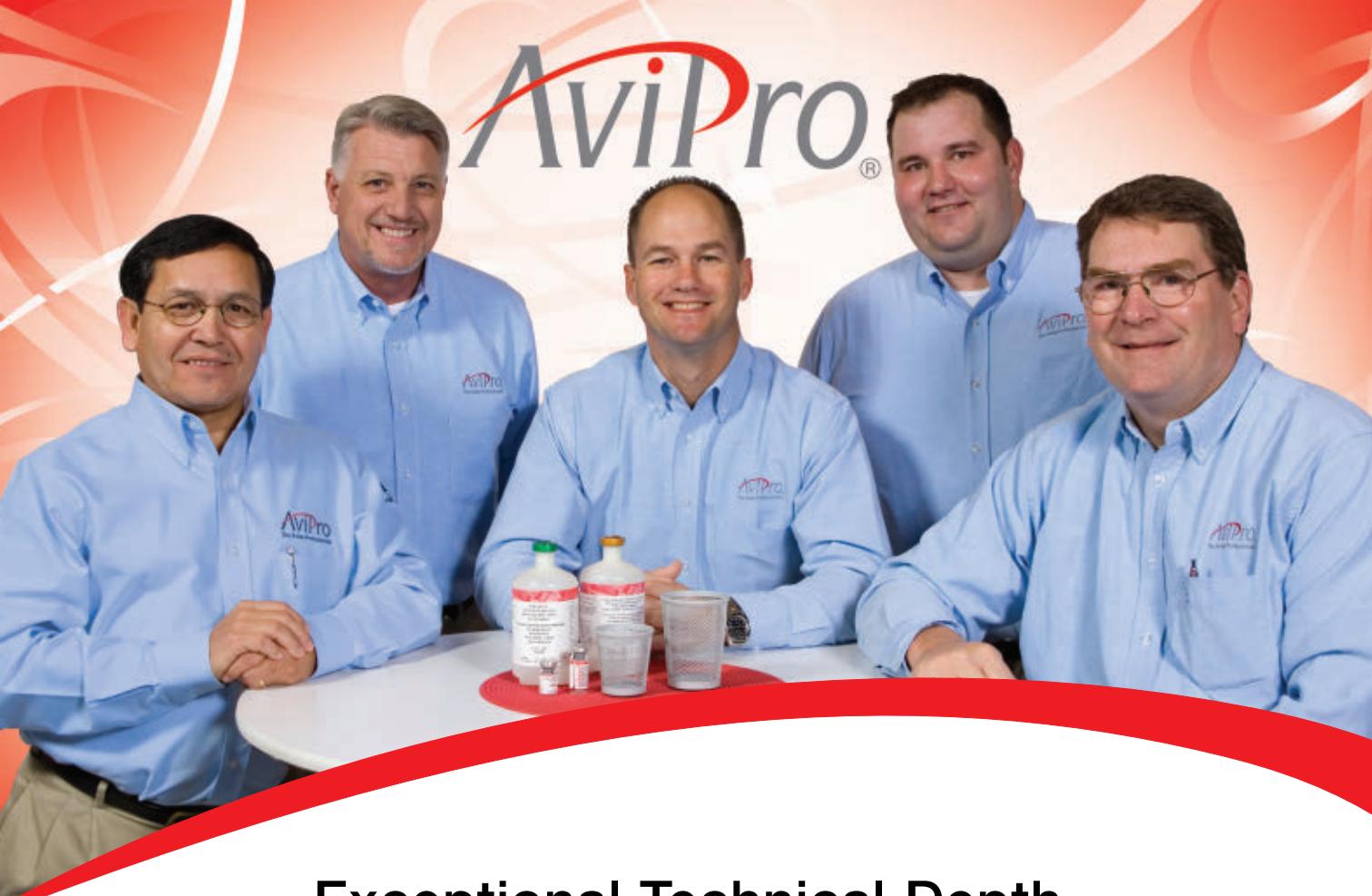
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In photo left to right are Lohmann Area Sales Managers:
Jesse Rodriguez, Greg Hanson, Joe Pierson, Tim Hopson and Brent Swanson

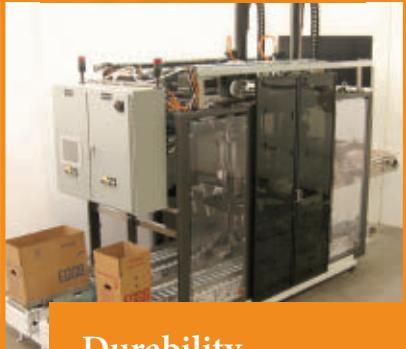
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FEATURES:

- Packs 20- and 30-count trays, 12- and 18-pack cartons of eggs!
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► INDUSTRY NEWS

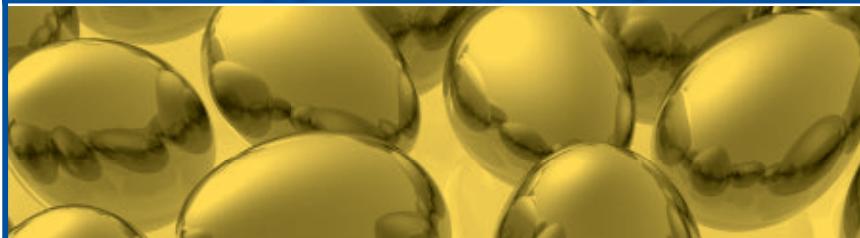
National Pesticide Information Center

Questions relating to the toxicity of pesticides, application of compounds and interpretation of labels can be addressed by the NPIC, 7 days a week from 6:30 a.m. to 4:30 p.m. Pacific Time.

The National Pesticide Information Center is operated by the Environmental and Molecular Toxicology Department, Oregon State University. The NPIC is a cooperative effort between OSU and the U.S. EPA.

The contacts are 1-800-858-7378 or access the website www.npic.orst.edu. E

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PRODUCT NEWS

Manure belt system



Jansen Poultry Equipment of Holland has introduced a manure belt system designed for slatted-floor housing. The belt can be rewound on an electrically driven drum to allow cleaning of the house floor beneath the belt. Contin-

uous plastic manure belts must be completely removed if the under-surface is to be cleaned following depopulation of a flock.

Jansen Poultry Equipment—www.jpe.org

Upgraded egg analyzer

Orka Food Technology of Israel released version 3.0 of EggAnalyzer which offers faster operation time and improved accuracy. The Unit will determine the egg's weight, yolk color, albumen height, and automatically calculates the Haugh unit and USDA grade

in 17 seconds.

Orka Food Technology—www.eggtester.com

Ceiling fan

The J&D Indoor/Outdoor Ceiling Fan is UL/CUL Certified for outdoor and agricultural use. It has passed all UL/CUL water spray and corrosion tests. The fan has forward and reverse operations to provide upward or downward airflow. The 60-inch ceiling fan has a sealed motor and housing and a limited lifetime warranty.

J&D Manufacturing—www.jdmfg.com

► MARKET PLACE

Ad sizes start at one column by one inch and can be any size up to six column inches. Logos and photographs are acceptable. Add color for an additional \$30 per color per insertion. The rate for EGG INDUSTRY is \$120 per inch per insertion (1-time rate), \$110 per inch per insertion (6-time rate), and \$100 per inch per insertion (12-time rate). The production charge is included except for ads with excessive make-up demands.

For more information on how to place your ad, contact:
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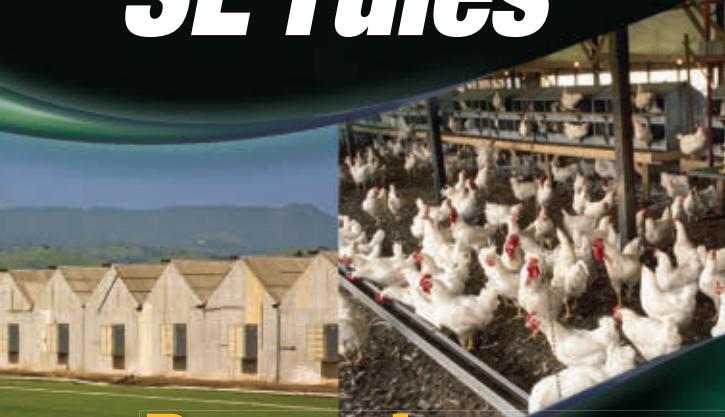
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