Welcome from the Director General

Analysis 1
The banning of conventional layer cages in the European Union

Analysis 2
IEC comparison of international country data

Country statistics and reports

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Italy
Japan
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Sweden
Switzerland
Turkey
United Arab Emirates
United Kingdom
United States

Note:
Figures used in this document are stated in United Kingdom format with a " , " to separate 000s and a " . " to denote decimal places.
In all cases for units of measurement "t" means "tonnes".
The currency used in this report is US dollars. All data is available in original currencies at www.internationalegg.com/stats.

Rapporteurs’ Contact Details
IEC Awards: Past Winners
CSR Statement
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IEC Information
Thank you for all your support this year as the IEC continues to grow, develop and move forward with key projects.

Our international representation program is going from strength to strength. IEC Chair Joanne Ivy continues to personally represent IEC in developing our relationship with the Consumer Goods Forum (the global Chief Executive network for the world’s top 800 grocery retailers and food manufacturers), and we have increasing recognition from both the Food and Agriculture Organisation (FAO) and the OIE, with IEC now having a seat on the OIE’s Animal Welfare Working Group.

This year IEC has signed two formal agreements with FAO. Firstly our joint Memorandum of Understanding, where FAO recognises IEC as the voice of the global egg industry and secondly a joint project to benchmark the life cycle analysis / carbon footprint of the main livestock sectors. This is a three year project with IEC having a place on the FAO steering committee. Thank you to Dr Vincent Guyonnet whose technical expertise and experience is so valued by IEC and the international organisations with which we work. We can now build on these relationships to bring real, long term benefits to the egg industry.

The relationship with FAO is a strong part of IEC’s own Corporate and Social Responsibility and one on which we can build, offering new and exciting opportunities. One of these opportunities is for FAO to help promote World Egg Day through their network of regional offices. For World Egg Day 2012 (12th October), IEC is providing its smart new logo, dedicated information packs and professional presentations to both IEC members and FAO regional offices. This is backed up by a brand new website www.worldeggday.com which will be launched in September and will be available in 10 languages. World Egg Day 2012 continues the theme of CSR, not just in terms of helping feed the hungry, but also in respecting the environment and providing communities with the highest quality protein product.

Thank you to all the Rapporteurs from around the world who have once again provided statistics for this publication from their individual countries. IEC now collects key egg industry data from 15 of the top 16 egg producing countries in the world. We would also like to welcome two new countries who now provide data: Ukraine and Russia.

Not only does this Review give you a clearer picture of the international egg market for the past two years, but also when combined with our on-line interactive database, you can analyse market trends from 2003 onwards. The value of this Annual Review is greatly enhanced by the in-depth professional analysis provided by both Peter van Horne (IEC Economic Analyst) and Professor Hans-Wilhelm Windhorst (IEC Statistical Analyst).

In this Review Professor Windhorst looks at one of the key changes taking place in our industry, providing an “Analysis on the banning of conventional layer cages in the European Union”. Peter Van Horne follows this theme, using the growing IEC database to analyse the three specific areas, “Development in housing systems”, “Development in egg consumption of shell eggs and egg products” and the “Development in production cost of eggs.”

2012 has also seen the introduction of our new IEC Constitution. One of the changes is the introduction of a “shareholders” style meeting at the end of the conference “the General Assembly of Members”. We encourage all IEC members to come and participate in this meeting and to continue to support the work of the IEC.

We continue to be in a period of historic change in many egg industries around the world, and hope that you find the information in this Review interesting and useful in helping ensure that you create opportunities for development from the changing situation. We wish you every success with your business in the years ahead.
Introduction:

Directive 1999/74/EC – the legal basis

In the European Union (EU), the discussion about keeping laying hens for egg production in conventional cages has been going on for many years. Today, the EU has one of the strictest legal regulations for keeping animals in the world and is a pioneer in this field for other countries.


- from January 1st 2012 onwards all conventional cages will be prohibited
- from January 1st 2003 onwards no such cages must be installed in EU member countries
- member countries may decide to ban conventional cages earlier and to tighten regulations of the directive.

Directive 1999/74/EC distinguishes between alternative systems, unenriched cage systems and enriched cages. The regulations for enriched cages are summarized in the adjacent panel.

The Commission also decided that before the final implementation of the directive, additional scientific studies should be undertaken to analyze the impacts on the welfare of laying hens and the economy of production.

In 2007, the results of these studies were available and the Commission decided in 2008 that the original regulations of the directive would not be modified.

The problem was that it took nine years before the final decision was passed and during this time period almost no investments were made because nobody was sure about the final regulations of the directive.
The transformation of cages to alternative systems began in 2007, but most of the new systems were not implemented before 2009 and 2010. In fact, in the fourth quarter of 2009, many egg companies placed pullets in their old cages because of the lower production costs.

Under the high pressure of animal welfare groups, the leading food retailers announced in 2010 that they would no longer list eggs produced in any form of cages, including colony nests. Consequently, the installation of colony nests immediately stopped and most of the egg companies switched to barn systems, which caused high financial losses.

As an impact of the banning of cages, egg production in Germany has decreased continuously since 2000 and the self-sufficiency rate fell from 74% in 2002 to only 59% in 2009 and to 55% in 2010, while the share of imports of eggs increased rapidly by 1.4 billion eggs between 2008 and 2009 to meet the demand (Figure 1).

**FIGURE 1: IMPORT OF SHELL EGGS AND DEGREE OF SELF-SUFFICIENCY IN GERMANY**
In addition, the number of layers also decreased from 43.5 mill. birds to 36.4 mill. birds in 2009. It was not before 2011 that the egg market began to recover; production started to increase again, imports decreased and the degree of self-sufficiency also increased to 64%. As late as 2012, the production volume once again reached the level it had been before the cage ban (AgE 2012).

The transformation process also had impacts on costs and prices. At Easter 2010, with 14.5 € per 100 barn eggs, (size L, bulk), the highest price was recorded because of the combination of egg shortage due to the transformation process and a growing demand. Only a few months later, there was a dramatic price decrease to 6 € and an egg oversupply because the transformation had been finalized, the demand during summer was low and in addition, large quantities had been imported. In 2011, there was a further price decline to 5.4 € due to the Dioxin crisis.

As a further result of the cage ban, housing systems changed in Germany. In 2005, more than 73% of laying hens were still kept in conventional cages, 14% in barn systems and 13% in free range while organic production was only a very small niche market. But in 2011, almost 63% of laying hens were kept in barn systems, 14.6% in free range, 7.3% in organic systems and only 14.6% in colony nests as Figure 2 shows.

It will take the German egg industry several more years to recover from the economic impacts of the transformation. Germany will remain the leading egg importing country in the future and its main suppliers will be the Netherlands, Spain and Poland.

Even though scientific studies document that colony nests are an animal welfare friendly housing system because they meet most of the demands of the animals, German NGOs have continued their fight against this form of “cages”. In 2011, they even went to court with the argument that they had not been included in the earlier decision to introduce colony nests after the banning of conventional cages.
Status of the transformation process in the EU

As described earlier, legally, conventional cages are prohibited in all EU member countries as of January 1st 2012. Similar to Germany, many egg farmers in other countries placed pullets in old systems in the last quarter of 2011. In addition, the economic crisis in Southern Europe did not allow a transformation in time.

The latest available data for November 2011 (Figure 3) shows that 36 % of laying hens were kept in enriched cages, 21 % in barn systems, 11 % in free range and 3 % in organic systems. But according to estimations of the EU Commission 14 % of layers were still kept in conventional cages and another 15 % were not defined.

Figure 4 shows housing systems in egg production for each EU member country in 2010.

Unfortunately, more recent data is not available at the moment. Nevertheless, the figure gives an impression of how housing systems after the transformation will differ in various countries.

In nine countries conventional cages still dominated egg production in 2010. While most Eastern and Southern European countries started to change to enriched cages, the share of barn systems increased in Germany, Austria, Sweden, the Netherlands and Slovenia.

In Ireland and the United Kingdom, free range was already very important compared to other housing systems in 2010. In the United Kingdom about 40 % of layers were kept in free range systems, 30 % in Ireland, while barn systems did not play an important role in both countries. In most countries organic production was very low, exceptions were Denmark, Sweden, Germany and Austria where organic systems reached a higher percentage.

Figure 6 provides an overview of countries that already used alternative layer systems in 2010. This confirms that the transformation in Southern and Eastern member countries started later and that most of these countries still used conventional cages in 2010.
A comparison of Figures 5 and 6 shows the progress of the transformation process between 2010 and 2012.

It is apparent that a lot of member countries had not concluded the transformation process on January 1st 2012 according to the time schedule of Directive 1999/74/EC. There were still conventional cage systems in use in France, Poland, Belgium, Spain, Italy, Portugal, the Netherlands, Latvia, Greece, Hungary, Bulgaria, Romania, Cyprus and Malta. Together they kept 46.7 mill. birds or 14% of all hens in the EU in old cages (AgE 2012).

Despite the ongoing transformation process, a massive reduction of the number of layers as happened in Germany, is not expected in most of the EU member countries. However, old housing systems may be used parallel to new systems. Eggs produced in conventional cages with lower production costs are therefore still in the market in 2012 but they are not allowed to be traded over the border in the EU.

Strictly speaking, conventional cages are an illegal housing system for layers in the EU. Several countries argue that they lack the financial means to transform the old housing system to alternative systems in time. On the other hand, countries like Germany and Austria which concluded the transformation in, or even before time, argue that they have to protect their egg farmers against imports from countries which still use conventional cages because of the lower production costs in these countries. Animal Welfare Organizations have also sharply criticized the state of conversion, especially regarding the long transition period since the passing of the directive.
Outlook
The EU Commission has now determined June 30th 2012, as the latest deadline for the transformation and is going to penalize countries for not meeting the deadline. But altogether, it is still an open question what is really going to happen after June 30th.

A further question is, will the EU become an egg deficit region from 2012 onwards? For years, the self-sufficiency rate of shell eggs for consumption has been quite stable with 102%. If no new hen houses were built and new housing systems were installed, the number of hens would decrease by 15% to 20% because of the lower number of birds per m² in enriched cages and barn systems. This would result in a considerable decline of the self-sufficiency rate and make imports necessary. But as in most member countries old systems have been used parallel to new systems, such a massive short-term decline has not occurred so far.

At the time this report was completed (July 2012), no data was available to analyze the current status of the transformation process and the economic consequences of the conventional cage ban in the EU. Moreover, there is a great uncertainty about the reliability of the data some countries gave to the European Commission.

Outside the EU, banning of conventional layer cages is also discussed in some countries, especially in the USA. Lessons to be learned from the European experience are that the time span between the passing of the law and the regulatory statutes has to be short. Otherwise, the transformation process does not begin and at the end leaves insufficient time for the egg companies to install the new housing systems. In Germany for example, empty and unused facilities were the result in late 2009 and 2010.

References
In 2012 all the IEC rapporteurs provided information on the egg industry in their country. Over the years the number of countries has expanded and this year the IEC collected data from 38 countries. As we have collected the same data now for several years we can analyse the developments over time. In this article an analysis was made for three different topics:

1. Development in housing systems

2. Development in egg consumption of shell eggs and egg products

3. Development in production costs of eggs

**Housing systems**

The IEC collects data on housing systems based on a division into three categories: cage, barn and free range. Cage systems include conventional cages, enriched cages and colony enriched cages. Barn systems are indoor non-cage floor systems (barn, deep litter and aviary systems). Free range systems give layers access to an outdoor area and also include organic production. Legislation in the EU forced farmers to ban the conventional cage system and replace it with enriched cages or an alternative non-cage housing system. It is interesting to see how the share per housing systems developed in recent years in the EU countries and whether there is any similar movement in countries outside the EU. Figure 1 gives the development of the percentage per housing system in some EU countries which provided data to the IEC over the longest number of years.

Figure 1 shows that in some EU countries the share of cage housing rapidly decreased between 2007 and 2011. Austria and Germany have additional legislation above EU level with an earlier ban on conventional cages. This explains the more rapid move to a low level of cage housing. Figure 1 illustrates that the share of cage housing is still at a high level in 2011.

Outside Europe the cage system is the dominant housing system for layers. According to the IEC data there is some development in the share of housing systems in Australia, Canada, New Zealand and USA. Figure 2 gives an overview of the development of the share of hens in cage systems in recent years in selected countries outside Europe. In Australia and New Zealand particularly, the percentage of hens in cage systems is declining. The numbers of hens in cage systems in Canada was 96% (data 2010) and 94% in the USA (data 2011). In many other countries the percentage of hens kept in cages on commercial farms is, according to the IEC data, 100% To be mentioned are the countries Brazil, India, Iran and Mexico.
FIGURE 1. DEVELOPMENT OF THE SHARE OF HENS IN CAGE SYSTEMS IN RECENT YEARS IN SELECTED EUROPEAN COUNTRIES

FIGURE 2. DEVELOPMENT OF THE SHARE OF HENS IN CAGE SYSTEMS IN RECENT YEARS IN SELECTED COUNTRIES OUTSIDE EUROPE
Figure 4 gives the egg consumption data for some countries outside Europe. Total egg consumption is low in Brazil and South Africa, high in Argentina and the USA and very high in Japan. The data also illustrates that the share of egg products is low in Brazil (6%), South Africa (5%), Iran (7%) and Argentina (6%). Generally speaking, the consumption of egg products is higher in countries with a relatively high income. In Canada and the USA the share of egg products is 27% and 31% respectively. In Japan the share is 50%, which can be explained by the specific food traditions and special dishes consumed in Japan.

**Consumption shell eggs and egg products**

The IEC rapporteurs are asked to give the consumption data in their country. Total egg consumption is the total of eggs consumed as shell eggs and egg products. The consumption of egg products is calculated in shell egg equivalent. However, not all IEC countries give the breakdown in shell eggs and egg products. The countries providing the data in 2010 or 2011 are given in Figure 3 (European countries) and Figure 4 (non-European countries).

Figure 3 illustrates that there is a wide range in level of total egg consumption. Of the selected countries Ireland has the lowest and France has the highest total egg consumption per capita per year. At the same time there is wide variation in the share of egg products in total egg consumption. Countries with a high share of egg products are Belgium (44%), France (39%), Italy (36%) and Switzerland (36%). These countries have a share clearly higher than the European average (of the countries mentioned in Figure 3) which is 27%. In Ireland and Finland consumption of egg products is below the European average. There could be a discussion as to whether the given data per country reflects the real consumption. It is known that Italy has a high consumption of pasta and as a result a high consumption of egg products. However, for Belgium it is known that this country has a large egg processing industry and a large volume of exports of egg products. It could be possible that the consumption of egg products is overestimated as the result of a lack of correction for the export of egg products in the calculation of the consumption data.
FIGURE 3. TOTAL EGG CONSUMPTION (NUMBER OF EGGS PER CAPITA PER YEAR) DIVIDED INTO CONSUMPTION OF SHELL EGGS AND EGG PRODUCTS FOR SELECTED EUROPEAN COUNTRIES.

FIGURE 4. TOTAL EGG CONSUMPTION (NUMBER OF EGGS PER CAPITA PER YEAR) DIVIDED INTO CONSUMPTION OF SHELL EGGS AND EGG PRODUCTS FOR SELECTED NON EUROPEAN COUNTRIES.
Production costs of eggs
The feed price has a large impact on the production costs of eggs. The share of feed costs in the total production cost of eggs in a cage housing systems is 55 to 60%. If you include the feed costs during the rearing period of the pullet this share is even higher, 60 to 65%. For a long period, since 2000, the layer feed price was very stable. After the sharp increase in 2008 the feed price was at a lower level during 2009 and 2010. In 2011 the feed price increased again to record levels. In the spring and summer of 2012 feed prices are still at a very high level. Figure 5 gives a historic overview of the layer feed price in the USA and in the Netherlands (representing the EU). In the Netherlands the price of layer feed the farmers are paying to the feed mill is available on a monthly basis. Every month the LEI research institute presents this price on their website (www.lei.wur.nl). In the USA the layer feed price is calculated based on published prices of corn and soybeans in addition to the costs of other ingredients, milling and transport costs. This price is calculated by the Egg Industry Center in IOWA. The feed price in both countries shows a similar development with very high prices in 2011 and in the first half of 2012.

It is interesting to see how the production costs developed in 2011 according to the information collected by the IEC rapporteurs. Figure 6 gives an overview of the production costs (in US$ per dozen eggs) during the last 5 years for some selected countries. It should clearly be stated that these prices are in US$. This means that changes in exchange rate of the local currency to the US$ can have an impact on the outcome. Figure 6 shows that in 2011 in all countries (except for India) the production costs of eggs were at the highest level since 2007. For most countries the last peak in production costs was 2008. However, this was not the situation in Argentina, Canada, India and Japan. Obviously other factors influenced the development in production costs in these countries. Figure 6 also illustrates the large differences in level of production costs between the countries. When we focus on the level in 2011 we see the lowest production costs in India, followed by Argentina, USA and Mexico. Japan and Canada have the highest production of eggs of the nine selected countries shown in Figure 6.
FIGURE 5. DEVELOPMENT OF THE PRICE OF LAYER FEED FROM JANUARY 2000 TO JUNE 2012 IN THE USA (US$ PER 100 KG) AND THE NETHERLANDS (EURO PER 100 KG).

FIGURE 6. DEVELOPMENT OF PRODUCTION COSTS (IN US$ PER DOZEN EGGS) IN 2007 TILL 2011 IN SELECTED COUNTRIES (DATA WAS NOT AVAILABLE FOR A PERIOD OF 5 YEARS FOR MANY COUNTRIES).
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IEC Statement on Corporate and Social Responsibility

The International Egg Commission, on behalf of the global egg community, defines social responsibility as balancing the needs of people, animals and the planet.

When evaluating our social responsibility, we are passionate about:

1) Producing safely, the highest quality protein.

2) Feeding the growing population, and ensuring food affordability.

3) Providing choice.

4) Caring for the environment.

and

5) Ensuring the health and wellbeing of our hens.
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# Country Representatives at IEC General Assembly

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- Ms J C Ivy (USA)

**Vice Chairman**
- C de Anda (Mexico)

**Hon President** (Sep 2010-Sep 2013)
- F Pace (Australia)

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- C de Anda (Mexico) - Vice Chairman
- B Dellaert (Netherlands) - Hon President
- A Joret (UK) - Executive Board
- T Lambert (Canada) - Financial Controllers

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- C de Anda (Mexico) - Vice Chairman
- B Dellaert (Netherlands) - Hon President
- A Joret (UK) - Office Holders
- T Lambert (Canada) - Financial Controllers
- C de Magalhaes (Netherlands) - Executive Board
- C Gregory (USA) - Financial Controllers
- S Manton (UK) - Hon President
- J Kellaway (Australia) - Vice Chairman
- J Nazar (Argentina) - Hon President
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IEC Family tree

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