

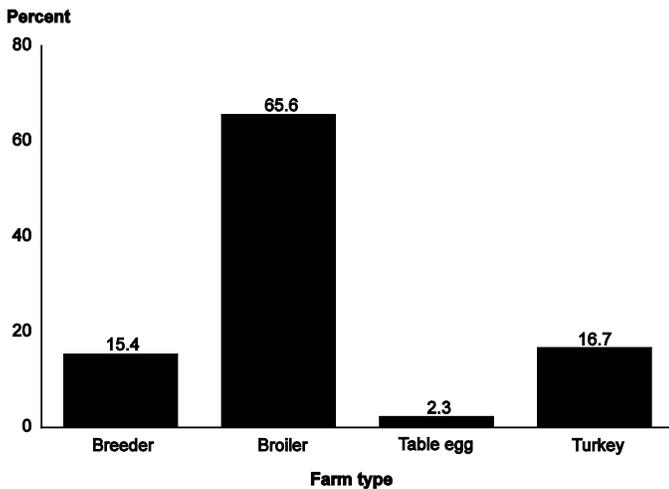
Highlights of Structure of the U.S. Poultry Industry, 2010

The USDA's National Animal Health Monitoring System (NAHMS) conducted the Poultry 2010 study. One objective of the study was to describe the structure of commercial poultry industries, including interactions among poultry industry segments, movements, and biosecurity practices. An understanding of the industry structure is important for managing disease outbreaks. The Poultry 2010 study was administered to the Nation's largest broiler, turkey, table-egg layer, and breeder companies,¹ accounting for over 70 percent of their respective industries. Estimates in this information sheet reflect the practices of these large companies only.

General industry structure

Nearly two-thirds of farms (65.6 percent) were broiler farms. Table-egg production farms accounted for 2.3 percent of farms. Turkey farms accounted for 16.7 percent of farms, and breeder farms accounted for 15.4 percent of farms (figure 1).

Figure 1. Percentage of farms by farm type

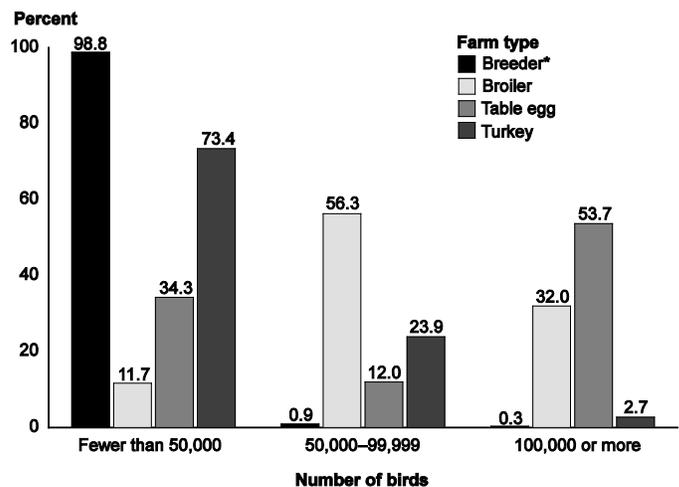


Broiler companies had a median of 464 farms, whereas table-egg companies had a median of 8 farms.

Nearly all breeder farms (98.8 percent) and three-fourths of turkey farms (73.4 percent) had fewer than 50,000 birds at maximum capacity. The majority of broiler farms (56.3 percent) had 50,000 to 99,999 birds,

and the majority of table-egg farms (53.7 percent) had 100,000 or more birds (figure 2).

Figure 2. Percentage of farms by number of birds present when at maximum capacity, and by farm type



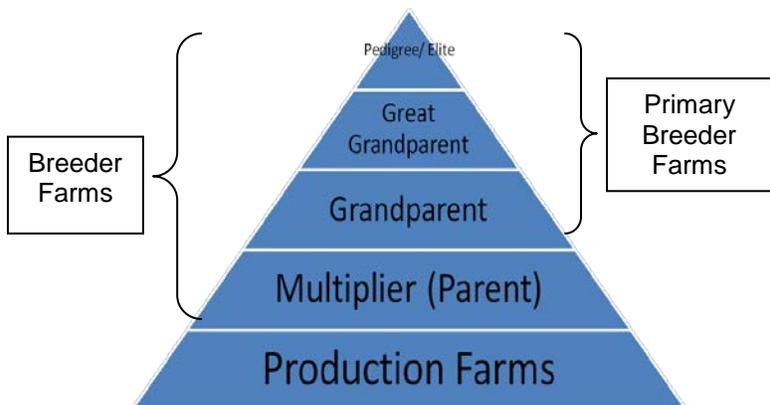
*Limited to breeder farms belonging to breeder companies.

Breeder farms

Poultry production begins with primary breeders—the genetic stock for the industry. Primary breeder flocks consist of pedigree (elite/foundation), great-grandparent, and grandparent birds. Grandparent flocks produce the final generation of breeding birds (multiplier (parent) flocks). Eggs from multiplier flocks hatch to become production birds (broilers, market turkeys, table-egg layers) for human consumption (figure 3).

¹ Turkey primary breeder companies were not included in the study.

Figure 3. Structure of breeder farms in the United States



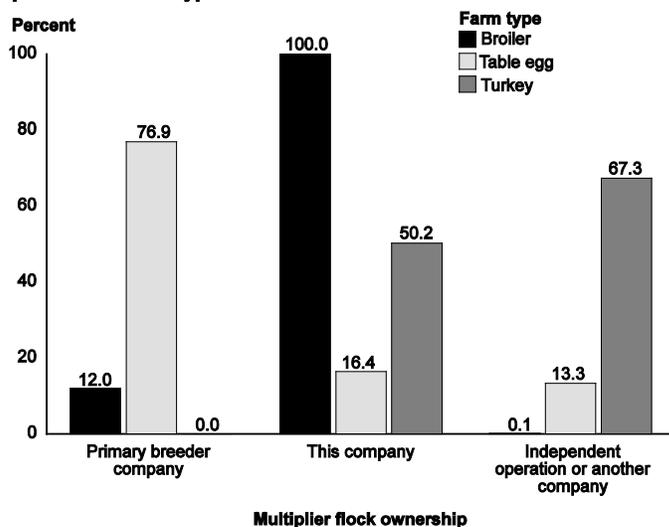
As suppliers of industry genetics, primary breeder farms commonly shipped eggs outside of their State (74.9 percent of farms) as well as outside of the United States (56.8 percent of farms). Multiplier farms mostly shipped eggs within the State (95.2 percent of farms).

Hatchery ownership differed by production type. Nearly all hatcheries that provided chicks to broiler farms (92.2 percent) were owned by the production company; less than 3 percent of hatcheries that supplied table-egg production farms were owned by the production company.

Hatcheries belonging to broiler and turkey production companies mostly produced chicks/poults to supply their companies only (92.0 and 63.6 percent of hatcheries, respectively). As producers of the genetics for the rest of the industry, 80.0 percent of primary breeder hatcheries supplied other companies.

Ownership of multiplier flocks differed by production type. All broiler farms received chicks produced by company-owned multiplier flocks. Pullets placed on the majority of table-egg farms (76.9 percent) were produced by multiplier flocks owned by a primary breeder company. Birds placed on the majority of turkey-production farms (67.3 percent) were produced by multiplier flocks owned by an independent operator or another company (figure 4).

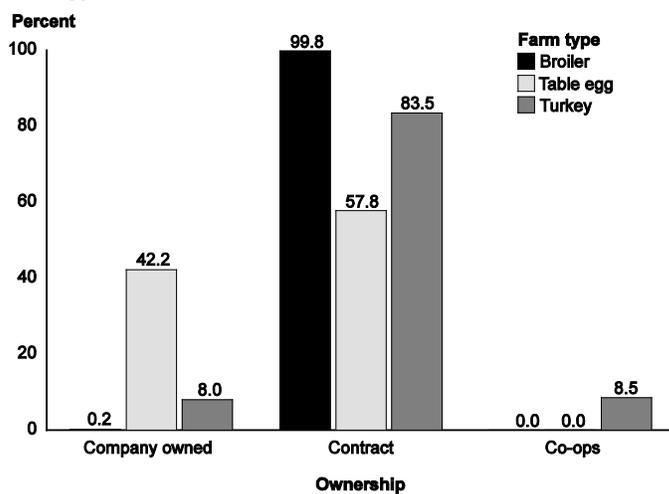
Figure 4. Percentage of production farms by ownership of the multiplier (parent) flock that supplied the chicks/poults/pullets placed on the farm during the previous 12 months, and by production farm type



Production farms

A higher percentage of table-egg farms than broiler or turkey farms were company owned (42.2 versus 0.2 and 8.0 percent of farms, respectively; figure 5).

Figure 5. Percentage of production farms by ownership and by farm type



Over 8 of 10 turkey-grower farms (82.8 percent) had toms only; 0.8 percent had both hens and toms. About 4 of 10 turkey-grower farms also had brood birds on the same farm (43.4 percent).

Organic farming was most common in table-egg production; 11.2 percent of table-egg farms had at least one house designated as organic.

Table-egg farms most commonly raised pullets on a separate farm belonging to the same company (86.6 percent of table egg farms) and located within the same State as the farm (77.0 percent of table egg farms).

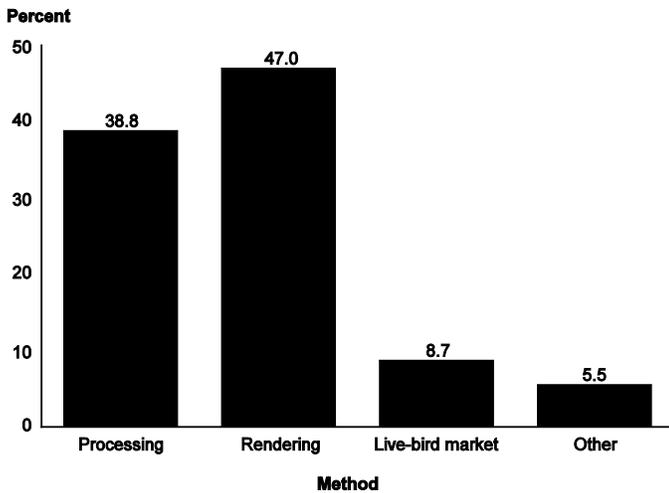
About 9 of 10 table-egg farms (87.5 percent) collected eggs by belt only.

About 8 of 10 table-egg farms (82.4 percent) primarily produced shell eggs, while 17.6 percent primarily produced eggs for breaking.

Of farms that primarily produced shell eggs, about one-third had on-farm egg processing facilities and two-thirds sent eggs off-farm for processing. About one-half of farms with on-farm processing (45.3 percent) processed eggs for other farms.

About one-half of table-egg farms (54.6 percent) molted their last completed flock. Molted flocks were kept in the laying house an average of 88.7 weeks and nonmolted flocks an average of 64.2 weeks. The most common methods of disposal of spent hens were rendering and processing (47.0 and 38.8 percent of farms, respectively; figure 6).

Figure 6. Percentage of table-egg production farms by primary method used to dispose of spent hens



On average, broilers were marketed or slaughtered at 7.2 weeks of age, turkey hens at 14.2 weeks of age, and turkey toms at 19.7 weeks of age.

No broiler or turkey farms marketed birds via a live-bird market.

All broiler slaughter facilities and three-fourths of the turkey slaughter facilities (77.3 percent) that slaughtered birds for the participating companies were owned by their respective production companies. None of the slaughter facilities slaughtered other species of poultry or other species besides poultry.

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