



# SMART TECH, SMARTER SUPPLY

## CHICKEN MARKETING ➤SUMMIT

July 28-30, 2025

DeSoto Savannah  
Savannah, Georgia

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# HPAI Outbreak in Poultry

Species	# of Premises	Total # of Birds	% of total
Broiler (includes breeder/pullets)	91	14,040,550	8.0%
Turkey (includes breeding stock)	478	19,050,860	10.9%
Egg Laying Hens (includes breeders/pullets)	142	138,317,900	79.1%
Ducks (includes breeder stock)	43	1,316,300	0.8%
Backyard	920	1,048,298	0.6%
Commercial Game Birds	34	1,030,140	0.6%
Totals*	1708	174,804,048	100%
*Timeframe from Current Outbreak:	February 8, 2022	Mid-June 2025	
Source: NCC, APHIS			

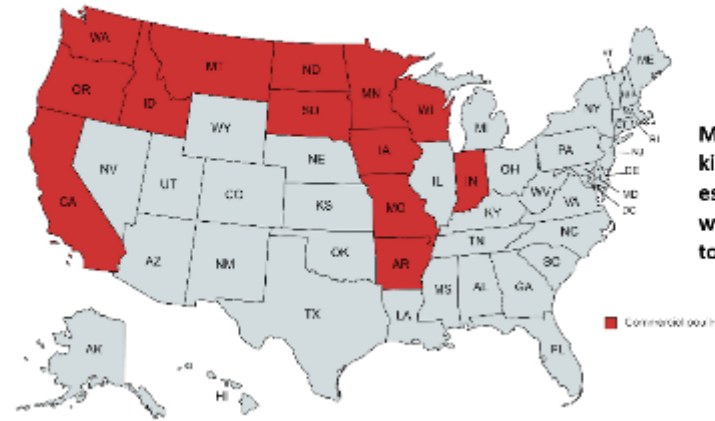
# Impacts to poultry sectors varried

- **Broiler sector:** impact has largely been **trade related**
- **Egg sector:** significant depopulation affecting
  - Ability to **produce**, and to **restock layers**
- **Turkey sector** is struggling on multiple fronts
  - Production (both regular, and seasonal) and hampering export volume



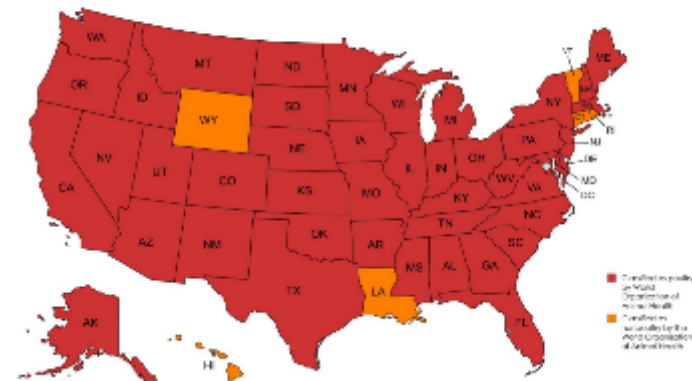
Flock detections found in all 50 states in current outbreak

## HPAI Outbreaks In The U.S. In 2015



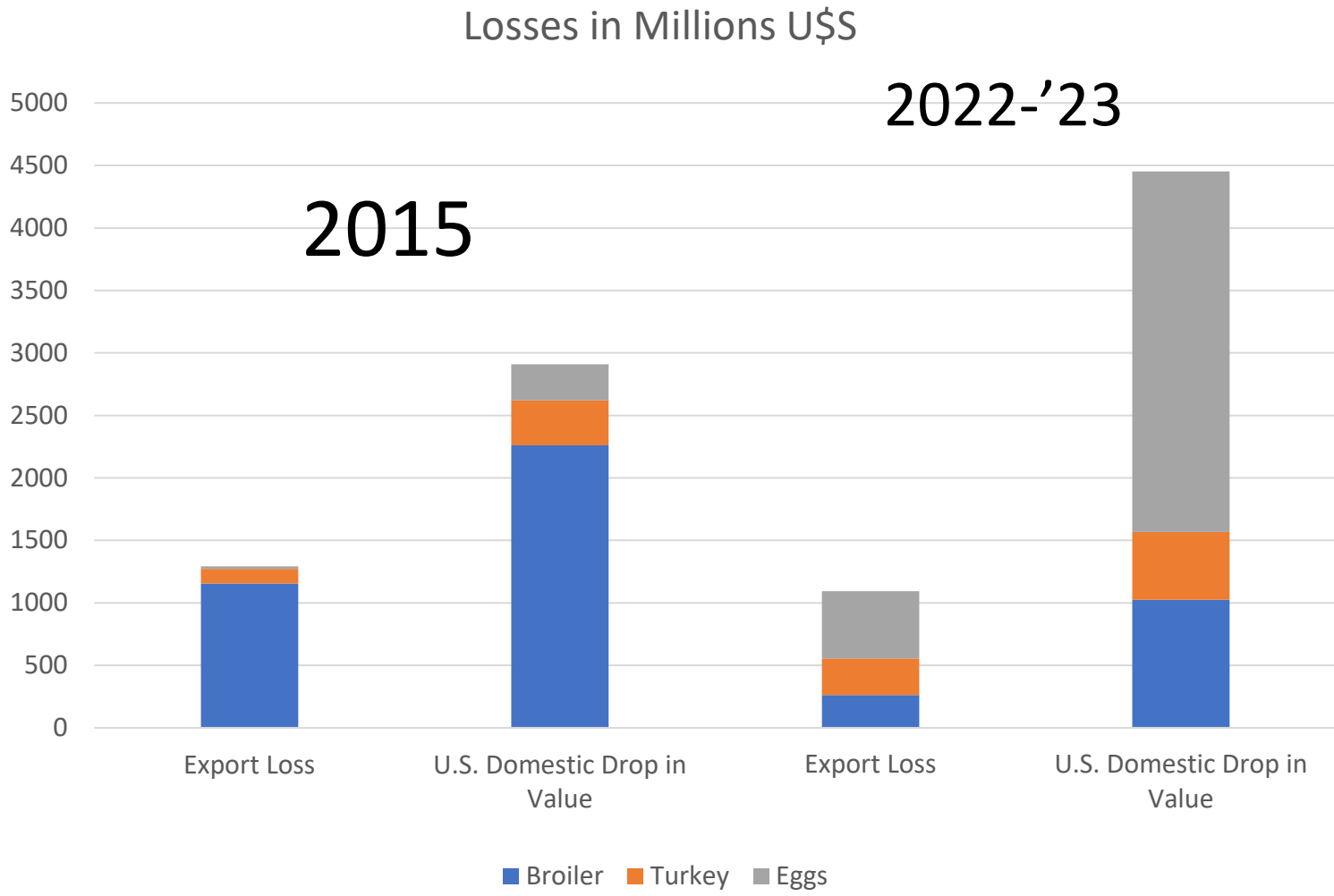
More than 50 million birds were killed or destroyed at an estimated cost of \$4.2 billion with direct export losses totaling \$1.3 billion.

## HPAI Outbreaks In The U.S. since 2022



- Over 169.30 million birds have been affected since Feb 8, 2022, across every state (all 4 flyways).
- HPAI has been detected in 1,700 flocks. Of those, 783 have been commercial flocks, and 917 flocks have been backyard

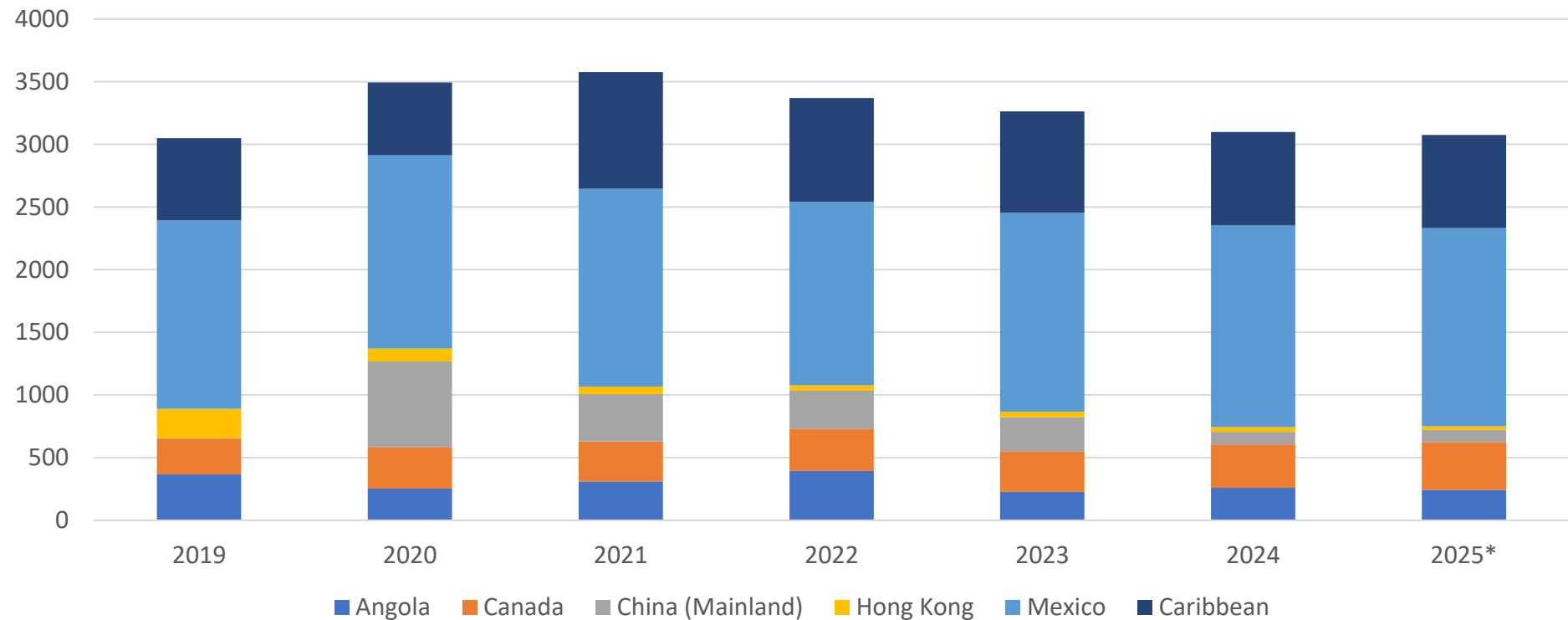
# How is HPAI affecting US poultry export?



Source: estimates USAPEEC

# Broiler exports to top destinations down, but not necessarily all HPAI related

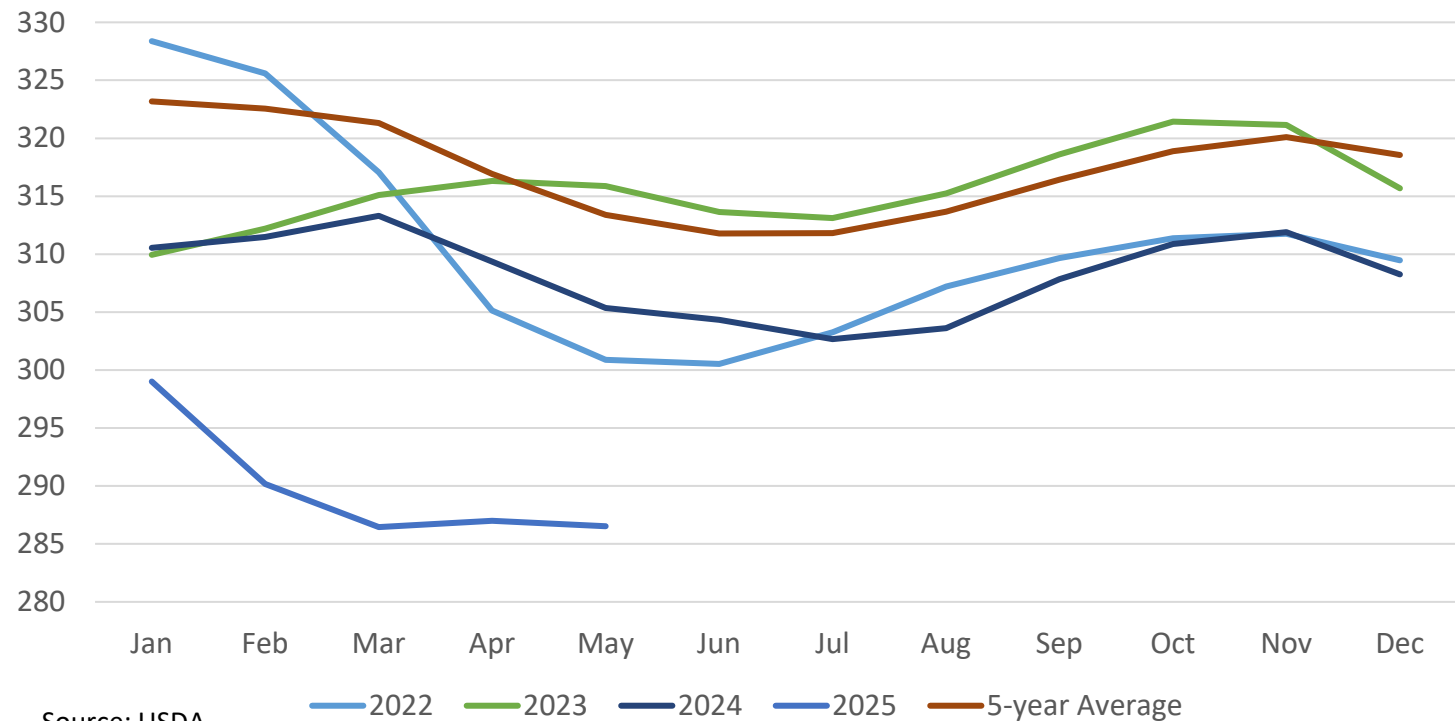
U.S. Broiler Export Volume  
(in Million lbs.)



# US table egg layer flock down - 40 million from pre-HPAI level

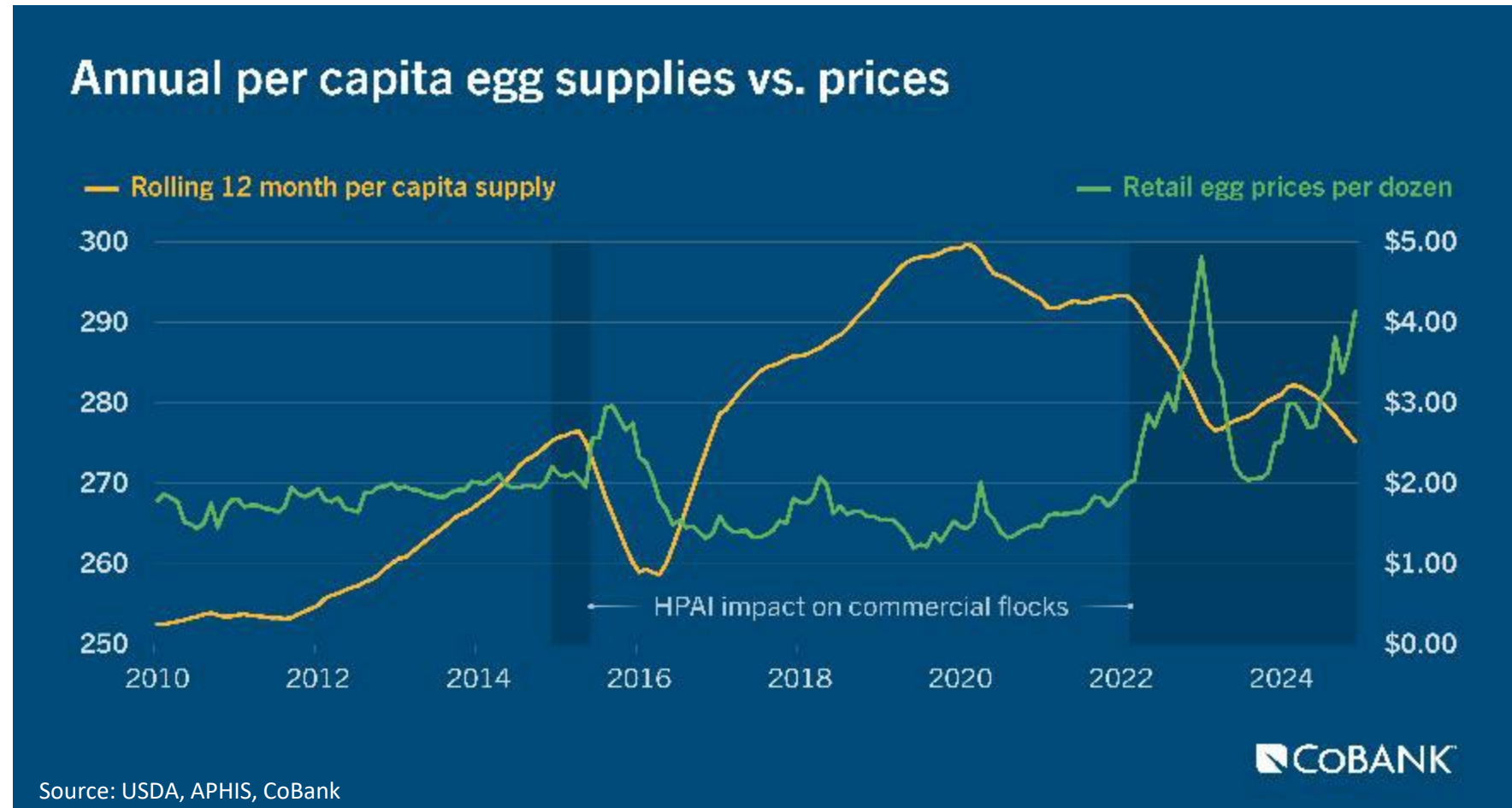
- From 2016-2020, the layer flock was generally in a rebuilding phase
- Growth was spurred by improved consumer interest, better margins, and Cage-free commitments
- The layer flock peaked in 2019, at more than 340 million
- COVID-19 issues provided a setback – decreased food-service business dampened flock totals
- HPAI decimated flocks in 2022, rebuild through '24, now again decimated

US Table Egg-Type Layers  
(Millions)



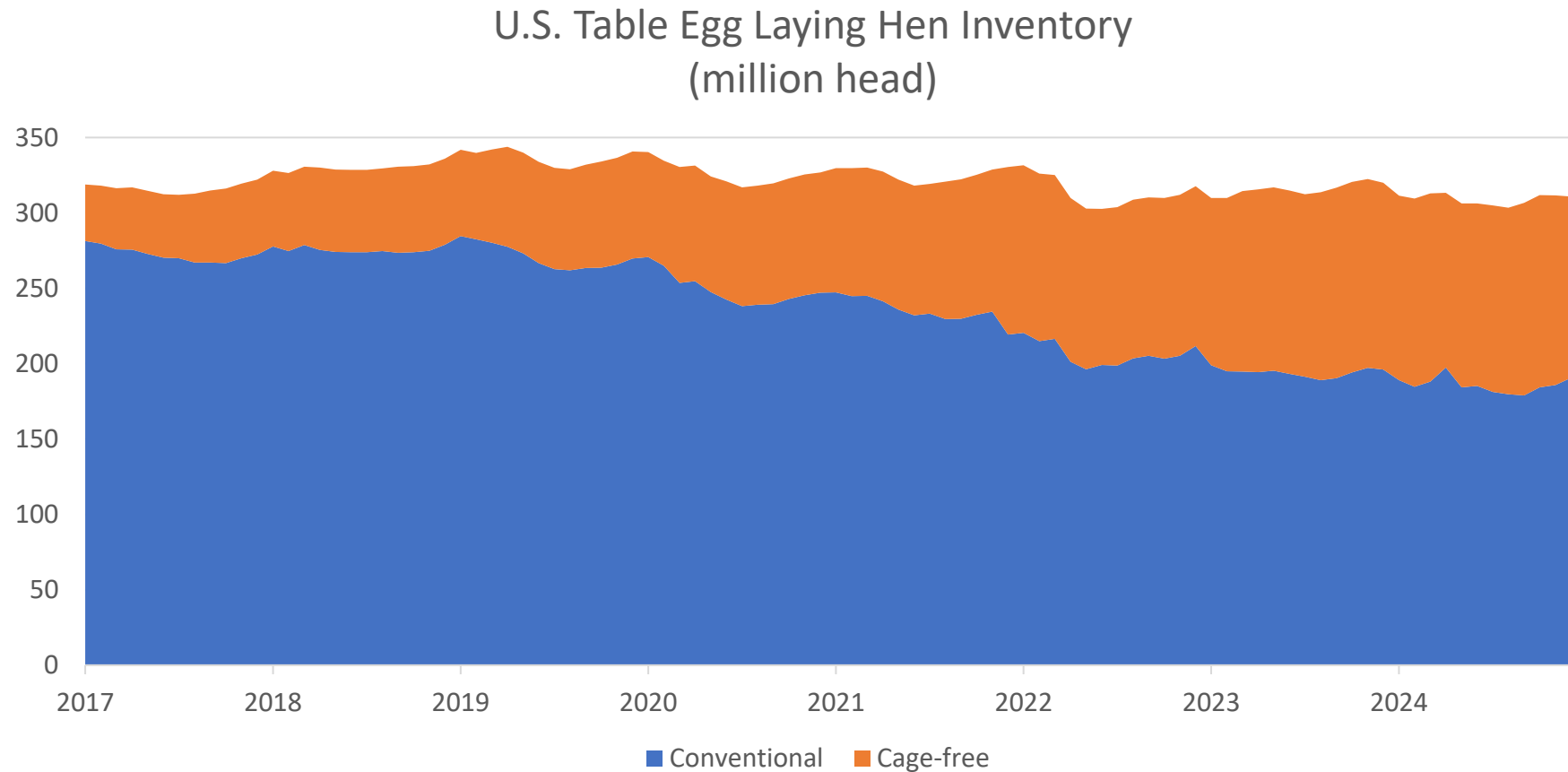
Source: USDA

# Egg Supplies Dampened by HPAI

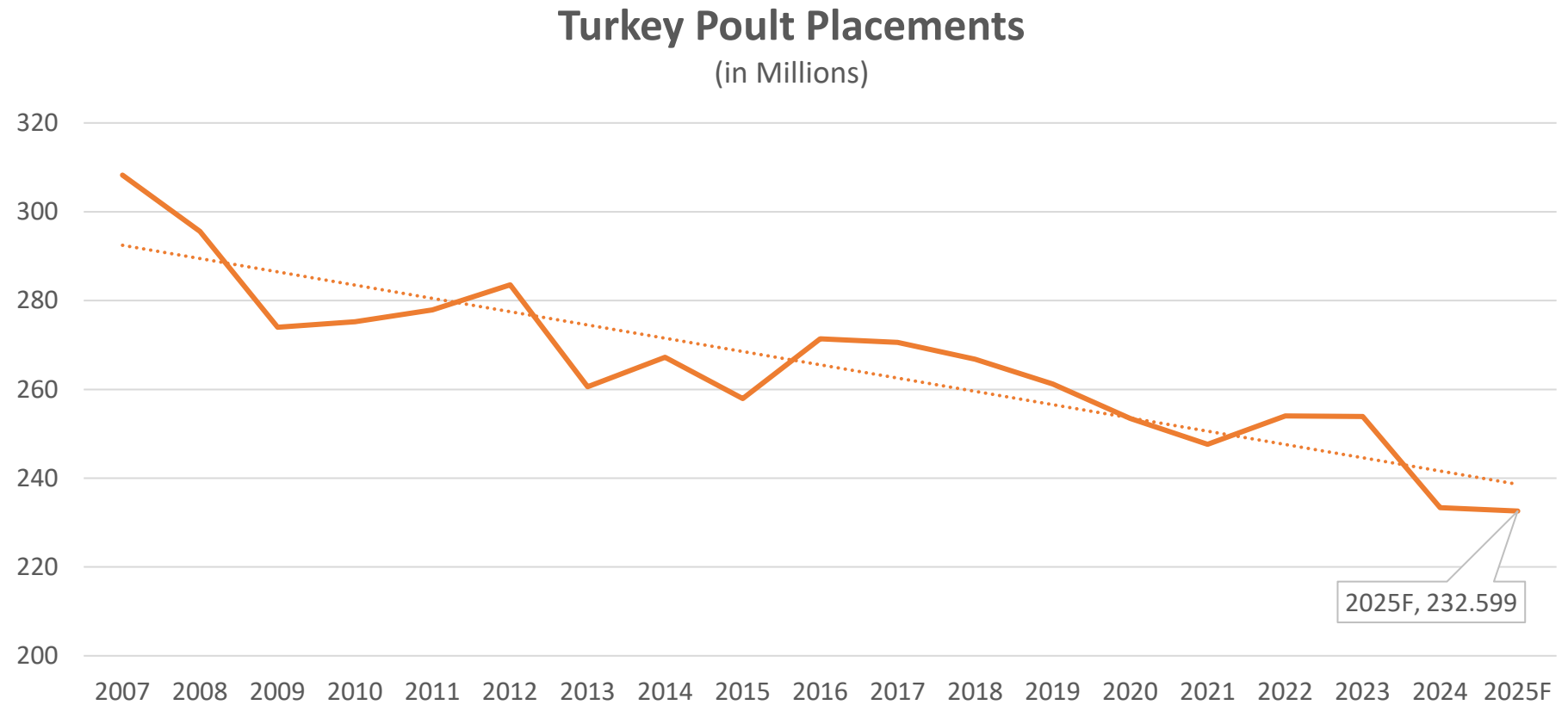




# “Cage-Free” conversion complicating markets



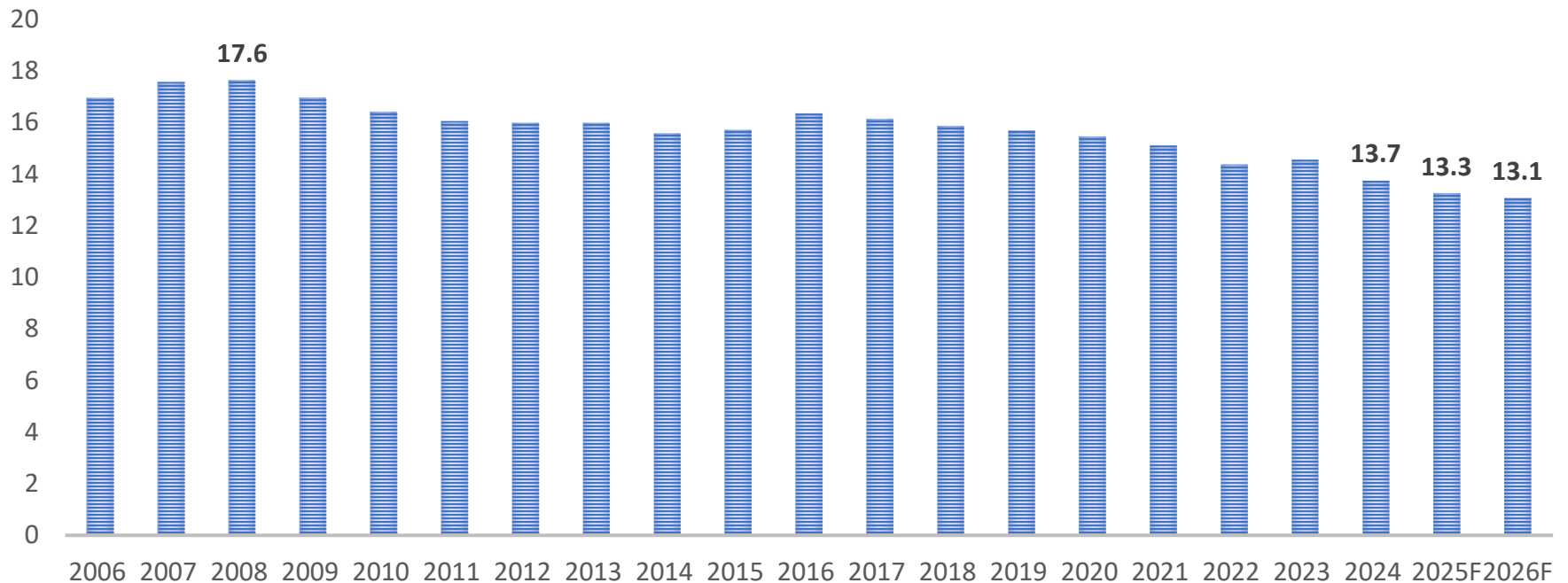
# Turkey poult placement/availability in decline



Source: USDA, CoBank

# U.S. turkey consumption, 35 year low

U.S. TURKEY CONSUMPTION,  
(PER CAPITA, RETAIL WEIGHT BASIS)



Source: USDA, CoBank