



Roost Report

Happy 250th “Bird”day, USA!

Mid-year reports are providing insight to what the rest of the year may have in store

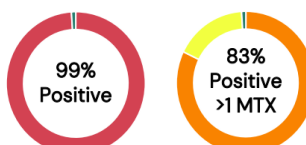


Industry

- Mycotoxin data from dsm-firmenich’s June survey shows 99% of corn samples tested positive for mycotoxins, with 83% of those containing more than one mycotoxin per sample.
- The USDA’s FSIS implemented a new analysis method for trace metals in meat and poultry products.
- Canadian companies have partnered to launch a new in-ovo egg sexing system that can sex embryos as early as day four of incubation. Launch is expected either late in the year or early 2027.
- Survey data from the FDA and USPOULTRY found antibiotic use increased significantly from 2022-2024, largely due to the rise of avian metapneumovirus, colibacillosis, and gangrenous dermatitis cases in turkeys and broilers.

Mycotoxin Survey Summary – 2025 US Corn

357 corn samples submitted from 22 states



vs. 92% in 2024

vs. 77% in 2024

- Changes in laboratory methods including lowered limits of detection (LOD) may influence historical comparisons vs. 2023-2025 survey results.
- 82% of samples in the survey dataset from the Midwest
- 2025 vs. 2024 US corn:
 - FUM: occurrence and mean concentration increased
 - B-Trich: occurrence increased and >2x higher mean concentration
 - ZEN: occurrence increased and nearly 3x higher mean concentration
 - Afla: occurrence and mean concentration slightly increased
 - Higher maximum concentrations

B-Trich

- 76% positive / ↑ from 70%
- 1,144 ppb / ↑ from 519 ppb

FUM

- 77% positive / ↑ from 65%
- 3,374 ppb / ↑ from 2,954 ppb

ZEN

- 78% positive / ↑ from 73%
- 132 ppb / ↑ from 45 ppb



vs. 2024



dsm-firmenich

What does this mean for the producer?

Mycotoxin prevalence in US corn continues to pose a risk to poultry producers. This risk is increased when multiple mycotoxins are present together. These numbers reinforce the need to closely monitor and regularly test feed ingredients and finished feed for mycotoxins as chronic exposure, even at low levels, can result in performance loss and increased disease susceptibility. At the processing level, the USDA’s adoption of a more in-depth detection method for trace metals reflects continued efforts to strengthen food safety and consumer confidence, potentially signaling to producers that regulatory oversight and quality assurance will remain a priority throughout the supply chain. Development of a new in-ovo chick sexing system accurate to as early as four days of incubation represents advancement in hatchery technology that could improve hatchery efficiency and lead to more predictable flock planning. Some benefits may include better coordination of pullet placements, more efficient housing and cleanout schedules, and improved forecasts of feed, vaccine, and labor needs. It should also be noted that there are potential benefits relating to animal welfare and consumer perception with this technology. Lastly, the reported increase in antibiotic use across the poultry industry highlights ongoing disease challenges present and emphasizes the need for strong biosecurity, vaccination programs, and alternative health strategies to reduce disease pressure and limit the potential for antibiotic-resistant pathogens. Recent outbreaks of aMPV and colibacillosis has increased tetracycline use in turkeys 54%, with broilers following a similar trend. The turkey industry also saw a six fold increase in linomycin use due to a penicillin shortage and outbreaks of gangrenous dermatitis.

Health

- Newcastle Disease Virus (NDV) continues to spread across Europe in both vaccinated and unvaccinated flocks.
- 1.6 million dozen eggs produced in Texas were recalled by the FDA due to potential Salmonella contamination.
- Research from UConn shows potential of postbiotics in chill water to reduce Salmonella levels on poultry products at processing.
- Researchers at UC Davis are investigating genetic resistance to HPAI as a potential long-term solution for the virus.

What does this mean for the producer?

The ongoing spread of NDV in Europe again emphasizes the need for strict biosecurity and vaccination programs. Vaccinations alone may not always completely eliminate disease risk, and producers should take care to prioritize proper vaccine storage and administration partnered with a strong biosecurity program. Additionally, the potential of NDV to spread globally through migratory birds or trade remains a risk, so flock monitoring and rapid response plans are important to consider as well.

The recall of 1.6 million dozen eggs distributed to stores across five states serves as a reminder that food safety issues can quickly impact producers through economic losses, market disruptions, and increased regulatory attention. Practices such as pest control, sanitation, and health programs can aid in reducing Salmonella risk. Because of continuing Salmonella outbreaks and risk, attention is being continuously put on further research to control Salmonella and decrease the threat to consumers. Studies evaluating postbiotics in poultry processing chill water suggest that alternative interventions may help reduce Salmonella load and improve food safety outcomes while complementing traditional processing methods.

Looking more long-term, research on HPAI is continuing to grow in popularity as the outbreak continues. Studies like that coming out of UC Davis looking into genetic resistance to HPAI could transform disease management, potentially reducing mortality, economic losses, and the need for large-scale depopulation events during outbreaks. However, regulatory changes would need to follow and adapt with research findings.

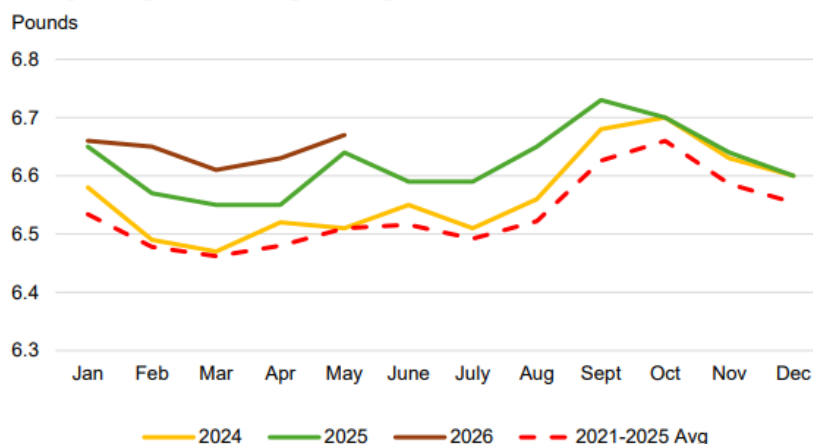
Market

(Data from USDA, Economic Research Service and National Agricultural Statistics Service)

Broilers

- Production is up year over year as of May due to increased average weights even though slaughter numbers were down.
- Chick placements have been increasing the first half of '26, with end of June numbers showing a 2% increase year over year.
- 2026 production projections have been increased to 49,552 million lbs, up 3.2 year over year, largely due to increasing broiler-type hatching layer inventory and increasing placements. Predicted production in 2027 is increased to 49,900 million lbs.
- National composite wholesale whole broiler price prediction for 2026 is increased a fraction of a cent to 121.3¢/lb.
- Prices are overall stable with only a slight reduction in '26 projected average price. Average price projection for '27 is unchanged.

Monthly average broiler slaughter weight, 2021–26



Source: USDA, National Agricultural Statistics Service.

Table Eggs and Egg Layers

- As of June 1st, the U.S. layer flock inventory was up 5.7% year over year at 311.5 million hens, and the replacement pullet flock was up 8.8% year over year at 145.1 million birds.
- Despite a July loss of 1.2 million hens and 275,000 pullets in Utah due to HPAI, '26 and '27 production projections are unchanged at 7,828 million dozen (4.4% year over year increase) and 8,010 million dozen (2.3% year over year increase), respectively.
- June NY wholesale egg prices were down slightly from May at 65¢/doz, but early July data showed average prices closer to 80¢/doz.
- The Q3 average egg price prediction is unchanged at 80¢/doz, and Q4 is slightly down at 115¢/doz, making the new '26 average price prediction 96.8¢/doz. The '27 average egg price prediction is unchanged at 107.5¢/doz.

Turkeys

- Average live weights were up 3.8% year over year in May, but production was down nearly 2% due to a 6% year over year decrease in slaughters. Recent weight data slightly increased Q2 projected production, with Q3 and Q4 production remaining unchanged.
- New production predictions for '26 is 5,056 million lbs, a 4.4% year over year increase. Predicted production for '27 is also adjusted down to 5,125 million lbs, a 1.4% year over year increase.
- Average wholesale prices for whole hen turkeys was slightly up in June at 179.5¢/lb. Due to the upward price trends seen in Q2, the average price predictions were increased through the rest of '26, resulting in a yearly average prediction of 165.3¢/lb. The '27 prediction is unchanged.

Corn

- Domestic use prediction for '25/'26 MY is up 125 million bu due to increased feed and residual use and decreased ethanol use predictions.
- Ending stocks for '26/'27 are down 170 million bu to 1.79 billion bu due to lower beginning stocks and increased projected exports.
- A slight increase in harvested area forecast led to a supply increase of 5 million bu in July, but overall corn acres harvested this year is still projected to be down 4% from 2025.

Soybeans

- Due to a 5% year over year increase in acreage, production is facing a record level, predicted at 4.5 billion bu for '26/'27 MY.
- Ending stocks and season average soybean price forecasts for '26/'27 MY are unchanged at 310 million bu and \$11.40/bu, respectively.

What's ahead for these markets?

The poultry markets are overall seeing strong production, especially in broiler and turkey live weights, that is expected to continue growing due to strong domestic demand, despite potential slow export growth due to global competition and ongoing trade challenges. However, the table egg market has seen some challenges. As egg production and laying hen and pullet inventories have recovered from the effects of HPAI, supply has outgrown demand, resulting in lower prices to producers and excess production being sold into the lower-value breaker market. Following a moderate spring HPAI outbreak, the upcoming fall migration season may bring volatility to the market if cases spike as they have in previous years during that time. Corn supplies are predicted to tighten compared to last year with a decrease in production, which supports potential, slight price increases while still providing adequate supplies for poultry and livestock feed. Domestic soybean crush demand is still benefiting the soybean market as well as domestic soybean oil use and export demand. These factors are likely to keep soybean prices firm even though another large crop is expected this year, which could mean slightly higher feed costs to poultry producers. However, consumer demand for poultry products should help support production and profitability.

Questions?

Ask a member of Ralco's poultry team.

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Sources available upon request

