



Egg Markets Overview

A weekly publication of the USDA AMS Livestock and Poultry Program, Livestock, Poultry, and Grain Market News Division

May 02, 2025

Negotiated wholesale prices for graded loose caged eggs are firm to higher while prices for cage-free eggs are weak to lower. Demand and movement into both retail and foodservice is light to moderate for light to moderate offerings. Supplies are moderate and sufficient for trade needs on moderate trading. Wholesale prices for national trading of trucklot quantities of graded, loose, White Large shell eggs increased \$0.14 to \$3.29 per dozen with a fully steady undertone. The wholesale price on the New York market for formula trading of Large cartoned shell eggs delivered to retailers remains unchanged at \$3.72 per dozen with a steady undertone. In the major Midwest production region, wholesale prices for Large, white, shell eggs delivered to warehouses were unchanged at \$3.61 per dozen with a weak-steady undertone while prices paid to producers for Large cartoned shell eggs held at \$3.43 per dozen. The California benchmark for Large shell eggs declined \$0.18 to \$5.20 per dozen with a weak undertone. Delivered prices on the California-compliant wholesale loose egg market decreased \$0.30 to \$4.38 per dozen with a weak undertone. Interest is light for light offerings and moderate supplies.

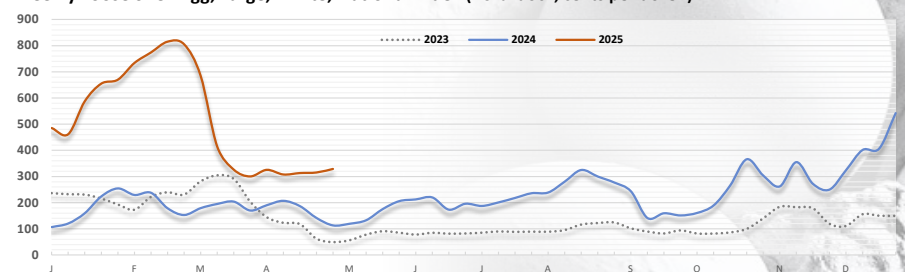
Demand for shell eggs slows in the post-Easter period in typical fashion as warmer weather brings a shift in consumer tastes with thoughts of backyard grilling. Most demand over the past week came from marketer efforts to replenish stocks drawn down by recent Easter movement. Demand is muted as current supplies are just shy of sufficient, which has helped to firm wholesale market prices and has kept grocers from featuring shell eggs in their weekly circulars. Price levels to the consumer have eased considerably from early-year highs but remain at levels not yet conducive to more than normal purchases needs as consumers are slow to adjust to what may be the new near-term norm. Demand from egg products manufacturers improves as that sector worked to increase production coming out of the holiday lull but found spot market offerings non-supportive, leaving most to work from owned production and stocks that are currently down 8% from the start of April.

Feature activity for Large class shell eggs remains limited and the current go-to ad price appears to be coalescing around \$3.99 per dozen, the average ad price again this week on very limited activity. A limited smattering of ads for specialty shell eggs is noted again this week but grocers are mostly avoiding conducting any egg-related promotions for now as they await the return of a more stable supply. This caution was acerbated this week by another outbreak of highly pathogenic avian influenza in commercial table egg layers. Although only the second outbreak recorded in April, it is enough to cause many to hold the line on everyday shell egg pricing and not run ads.

The overall shell egg inventory declined just over a half percent while the national inventory of Large class shell eggs was about unchanged. Stocks of Large shell eggs in the key Midwest production region declined 7% as the marketing chain restocked

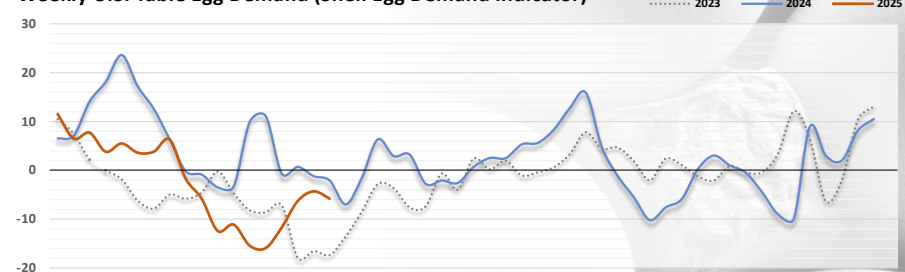
Source: USDA AMS Livestock & Poultry Program, Livestock, Poultry, and Grain Market News Division

Weekly Loose Shell Egg, Large, White, National Index (f.o.b. dock, cents per dozen)



Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

Weekly U.S. Table Egg Demand (Shell Egg Demand Indicator)



Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

This Week's Retail Large Shell Egg Feature Summary

Advertised Prices to Consumers at Major Retail Supermarkets

	White-Shell		Brown-Shell	
	Activity	Price	Activity	Price
Caged				
conventional	40	3.99	--	--
nutritionally-enhanced	--	--	--	--
Cage-Free - Non-Organic				
barn/aviary	--	--	--	--
free-range	--	--	--	--
pastured	--	--	15	7.99
USDA Organic				
organic	--	--	--	--
free-range	--	--	15	6.49
pastured	--	--	15	9.69

includes 12 and 18 packs combined; prices weighted by store count.

caged, conventional	47%
caged, ne	0%
CF, barn/aviary	0%
CF, free-range	0%
CF, pasture	18%
organic	0%
organic, free-range	18%
organic, pasture	18%

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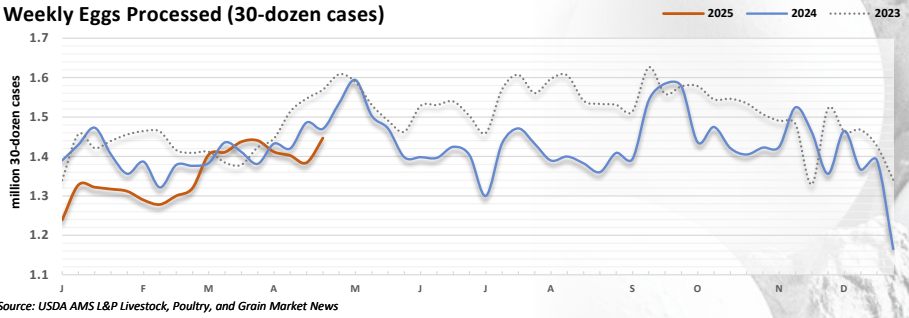
following movement over the recent holiday. The inventory share of Large class shell eggs was up a half percent to a 50.5% share of all shell egg stocks on inventory at the start of the week. Stocks of cage-free eggs rose 5% while stocks of nutritionally-enhanced eggs decreased 9%. Stocks of organic shell egg were up a half percent and breaking stock inventory was down about 1.5% to fuel increased production following the holiday lull. Total estimated table egg production was unchanged from last week but up 3.5% from last year to a year-to-year deficit the equivalent of 10.9 million cases in total.

The average national wholesale price for breaking stock increased \$0.17 to \$2.71 per dozen with a firm undertone. Demand is moderate to good in a full range for light offerings. Supplies are light to moderate with mostly full-time schedules. Trading is moderate. The volume of eggs processed last week rose 4.5% and the share of weekly table egg production gained 1.5% to nearly 33%. Cage-free stock accounted for 34.5% of eggs processed last week, down one percent in share. Production of whole egg was up about 5.5% while production of egg components both increased - whites by 6% and yolk by 4%. Dried egg production increased nearly 4% and production of inedible egg was up just under 1.5%. Breaking yields without inedible improved a quarter pound to 41.99 pounds per case broken.

Wholesale prices for certified liquid whole eggs are steady on good demand for light offerings. Trading is moderate to active. Wholesale prices for whole frozen eggs are \$0.32 higher at \$3.10 per pound while prices for frozen whites rose \$0.35 to \$2.65 per pound. The undertone is firm with a full range of demand for light to, at times, moderate offerings. Supplies are light to moderate and trading is moderate. Prices for dried eggs remain too few to report. The undertone is steady with good demand. Offerings and supplies are light to moderate and trading is moderate.

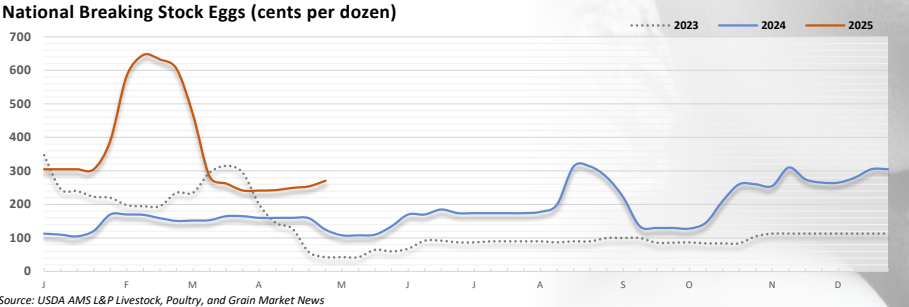
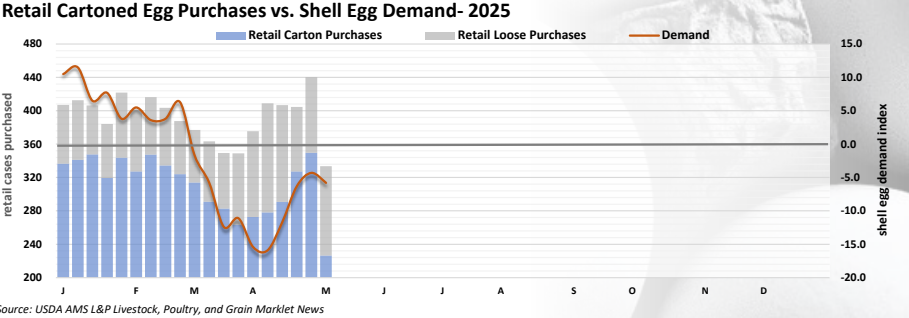
According to NASS, the March monthly volume of frozen eggs in storage was unchanged from February but was 52% below the prior year. This is the lowest level of egg products stocks recorded in at least the last 10 years. Stocks of whole frozen egg increased 2%, 57% below last year and the share of whole egg stocks gained one percent to a 37% share of total frozen stocks. Stocks of frozen yolk decreased 2% and were 45% under last year's level. This is the lowest level of yolk stocks ever recorded. Frozen egg whites declined 4% to a level 59% below last year. Stocks of unclassified eggs declined one percent from last month and were down 47% from last year. The share of unclassified frozen stocks remained at a 52% share of total frozen stocks.

As of April 1, 2025, the estimated U.S. non-organic commercial cage-free table egg flock was about unchanged at 105.3 million, 37% of the current U.S. table egg flock. This represents a 6% increase from the number of non-organic, cage-free table egg layers in April 2024 when 3.5 million non-organic, cage-free layers were lost to HPAI. The current flock number represents a 5% increase in share of the total commercial table egg flock compared to April 2024.



Eggs Processed - Week-to-Week Change						
total	share	case yield*	whole	whites	yolks	dried
4.5%	1.5%	0.24	5.4%	6.1%	4.0%	3.8%
						inedible
						1.4%

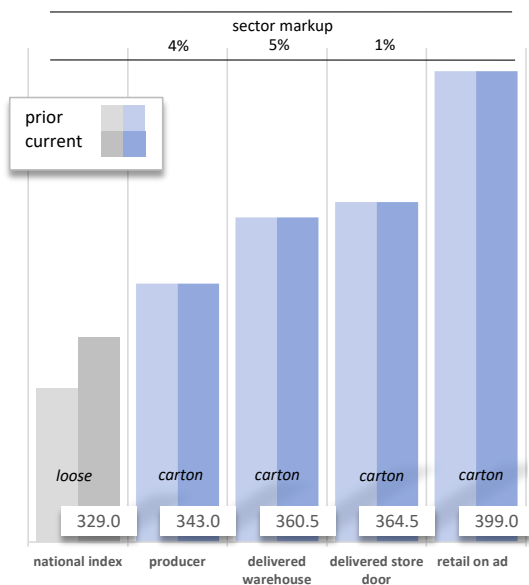
* case yield w/ inedible in pounds per case.



Shell Eggs Market Price Comparisons

(as of May 02, 2025)

(National Index on a loose-egg basis, all other prices for cartoned eggs; LG White avg prices in cents per dozen)



Producer, warehouse, & store door = MW; retail no sale NY market; retail on sale Nat'l Retail Feature; loose eggs include minimal material costs.

Key Egg Markets Overview

	Recent History						
	2-May	% Change	25-Apr	18-Apr	11-Apr	4-Apr	28-Mar
SHELL EGGS (Large, White, conventional in cents per dozen)							
National, loose (negotiated; f.o.b. dock prices)	328.99	4%	315.35	313.27	307.77	325.93	300.38
California-compliant, loose, (negotiated delivered)	438.21	-6%	468.15	465.06	497.70	510.94	533.57
Midwest, cartoned (formula sales; dlvr'd to warehouse)	360.50	0%	360.50	360.50	370.50	374.50	386.50
New York, cartoned (formula sales; dlvd to store)	372.00	0%	372.00	372.00	372.00	377.00	386.00
California-compliant, cartoned, benchmark	510.00	-3%	528.00	549.00	585.00	595.00	605.00
National Retail Shell Egg (avg. ad price in dollars per dozen)							
Conventional Caged, Large, White	3.99	0%	3.99	3.93	4.28	3.98	4.00
UEP Cage-Free, Large, Brown	n/a		n/a	n/a	n/a	n/a	n/a
EGG PRODUCTS (f.o.b. shipper dock prices)							
Breaking Stock (negotiated; dlvd prices cents per doz)	270.75	7%	254.00	249.50	242.75	241.50	241.75
Whole Frozen Egg (dollars per pound)	3.10		2.78	n/a	2.78	2.90	n/a
Whole Dried Eggs (dollars per pound)	n/a		n/a	n/a	n/a	n/a	n/a
Processed Share of Weekly Shell Egg Production	32.7%	1.5%	31.2%	31.5%	31.6%	32.1%	31.5%
SHELL EGG DEMAND INDICATOR (no units)	-5.8	-1.5	-4.3	-6.3	-11.7	-15.9	-15.4

Source: USDA AMS Livestock, Poultry, and Grain Market News; "n/a" = not available.

Key Shell Egg Markets Snapshot - 2025

(Large, White, Conventional Shell Eggs in cents per dozen)	2-May	Change	25-Apr	2025 High		2025 Low	
National, loose (negotiated; f.o.b. dock prices)	329.0	▲ 4%	315.4	816.8	03-Mar	292.3	26-Mar
California-compliant, loose, (negotiated delivered)	438.2	▼ -6%	468.2	996.2	26-Feb	438.2	02-May
Midwest, cartoned (formula sales; dlvr'd to warehouse)	360.5	■ 0%	360.5	841.5	28-Feb	360.5	11-Apr
New York, cartoned (formula sales; dlvd to store)	372.0	■ 0%	372.0	853.0	25-Feb	372.0	09-Apr
California-compliant, cartoned, benchmark	510.0	▼ -3%	528.0	1035.0	28-Feb	510.0	25-Apr
Breaking Stock (negotiated; dlvd prices cents per doz)	270.8	▲ 7%	254.0	633.8	18-Feb	238.8	07-Apr
Whole Frozen Egg (dollars per pound)	3.10	■ 0%	2.78	5.31	28-Feb	2.69	03-Jan
Whole Dried Eggs (dollars per pound)	n/a	■ 0%	n/a				
Natl Average Retail Ad Price - Conventional caged	3.99	■ 0%	3.99	4.28	11-Apr	1.87	03-Jan
Natl Average Retail Ad Price - UEP Cage-free ²	n/a	■ 0%	n/a	7.99	21-Feb	2.50	17-Jan
Shell Egg Demand Indicator	-5.8	▼ -1.5	-4.3	11.5	02-Jan	-15.9	02-Apr

2025 Commercial Table Egg Flock HPAI Losses as of May 02, 2025

An outbreak of highly pathogenic avian influenza (HPAI) was reported this week in a commercial caged table egg flock in Aurora County, South Dakota. In 2025 to date, HPAI in commercial table egg layer flocks have resulted in the depopulation of 31.3 million birds. To date, USDA APHIS has confirmed 42 outbreaks in layer flocks in 10 states (AZ, CA, IA, IN, MO, NC, OH, PA, SD, and WA). The 31.3 million birds lost included 20.3 million (65%) in conventional caged systems, 11.0 million (35%) in cage-free systems, and 26,000 organic (0.1%). These losses represent 11.1% of the conventional caged layer flock, 10.8% of the non-organic cage-free flock, and 0.1% of the organic flock on January 1, 2025.

Compared to January 1, the caged flock on April 1 was down 11.7% while the cage-free and organic flocks increased – by 4.3% and 0.3%, respectively. As of the end of April, nearly two-thirds of layer losses have occurred in caged systems (65%). To date, Ohio has borne the brunt of 2025 outbreaks with 13.5 million (43%) of losses occurring in Ohio flocks.

2025 Table Egg Layer Losses by Production System

System	Loss	Share
Conventional Caged....	20,284,520	65%
Cage-Free.....	10,955,480	35%
Organic.....	26,100	0.1%
Total	31,266,100	

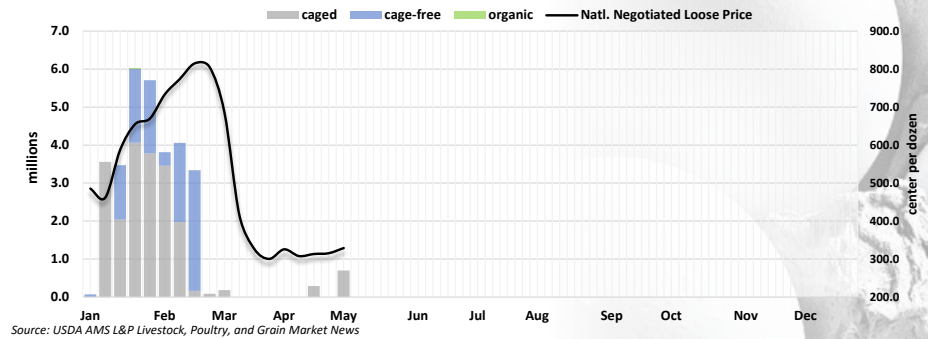
2025 Table Egg Layer Losses

(layers lost to Highly Pathogenic Avian Influenza (HPAI))

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Totals	Share
AZ	316,600												316,600	1%
CA	75,200												75,200	0%
IA		241,600											241,600	1%
IN	3,013,300	3,591,400	187,200										6,791,900	22%
MO	3,910,300												3,910,300	13%
NC	3,314,900												3,314,900	11%
OH	7,845,300	5,408,800		293,300									13,547,400	43%
PA		2,060,400											2,060,400	7%
WA	307,800												307,800	1%
SD				700,000									700,000	2%
													-	0%
													-	0%
													-	0%
Total	18,783,400	11,302,200	187,200	993,300	-	-	-	-	-	-	-	-	31,266,100	

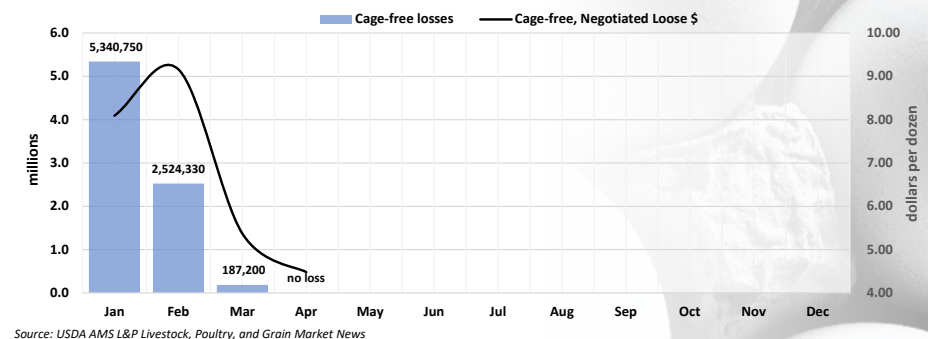
Source: USDA AMS Livestock & Poultry Program, Livestock, Poultry, and Grain Market News Division

2025 Table Egg Layer Losses by Production System v. Natl Loose Egg Price



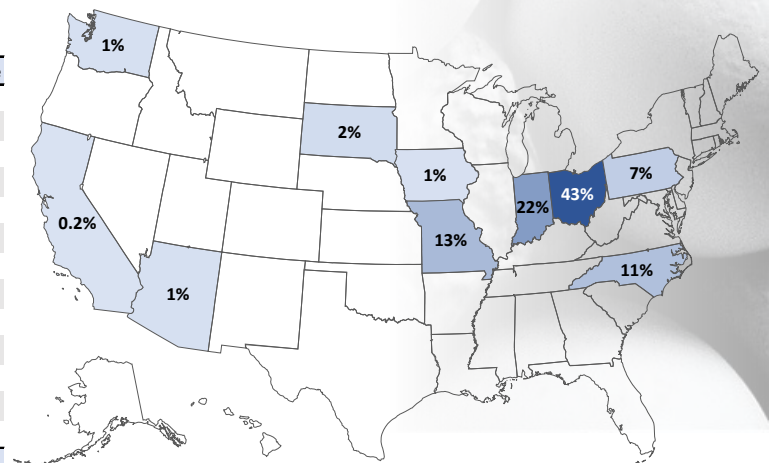
Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

2025 Cage-Free Layer Losses v. Monthly Negotiated Cage-Free Loose Egg Price



Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

Share by State of Total 2025 Commercial Table Egg Layer Losses



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