



# Egg Markets Overview

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

July 25, 2025

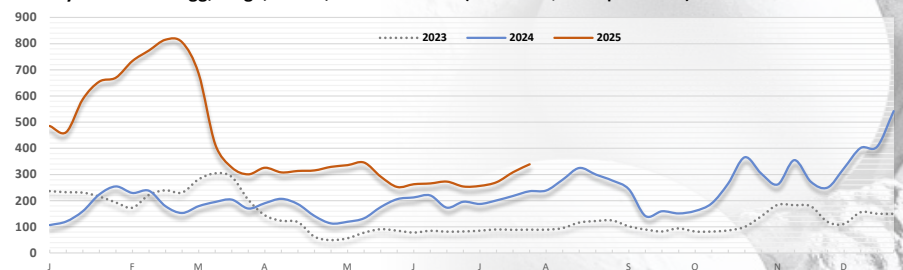
Negotiated wholesale prices for graded loose caged eggs moved higher on mostly moderate demand, best for heavier-weight eggs that are in shorter supply. Supplies and offerings are mostly light to moderate on moderate trading. Wholesale prices for national trading of trucklot quantities of graded, loose, White Large shell eggs increased \$0.30 to \$3.39 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 increased \$0.12 to \$3.70 per dozen with a steady undertone. In the major Midwest production region, wholesale prices for Large, white, shell eggs delivered to warehouses increased \$0.34 to \$3.40 per dozen with a firm undertone while the price to producers for Large cartoned shell eggs increased to \$3.22 per dozen. The California benchmark for Large shell eggs rose \$0.52 to \$4.70 per dozen with a firm undertone. Delivered prices on the California-compliant wholesale loose egg market increased \$0.05 to \$4.34 per dozen with a steady undertone. Demand is light to moderate for moderate offerings and supplies. Trading is slow to moderate.

Shell egg demand improved over the over the past week, stimulated by significant featuring by major grocery chains in the most recent ad cycle at the most attractive average ad prices of the year so far. Since late May, demand for shell eggs has been gradually improving, following a trend typical of this time of year. The supply of heavier-weight eggs, particularly the consumer staple Large class, has tightened as current repopulation and scheduled flock replacement efforts have increased the percentage of young layers in the flock that have not yet reached full mature production. Demand from egg products manufacturers has been flat as many had a comfortable inventory of stock left over by the holiday break supplemented by owned production and a continued influx of imported shell stock. Domestic price levels for breaking stock had declined to the point where importing shell eggs was becoming less attractive and this, combined with concerns over proposed tariffs rates on source countries, is slowing the volume of eggs shipped from foreign sources. Many breakers are taking advantage of the increased supply of lighter-weight shell eggs that are available on the spot market at price levels that make them desirable to break despite the resulting lower yields.

Feature activity declines sharply from the active pace of the prior ad cycle. Ads for conventional caged eggs post a significant drop in ad appearances and the average ad price increased as last week's attractive prices expire. The average ad price rises \$0.63 to \$2.68 per dozen. Featuring of [UEP-certified](#) cage-free shell eggs also retreats sharply, accounting for 19% of all shell egg ads this week and the average ad price increases \$0.52 to \$3.71 per dozen. Promotions for organic pastured shell eggs dominate this week's ad space after sitting out last week and are joined by a few ads for organic and non-organic free range types. Nutritionally-enhanced shell eggs, of both colors, see a much more limited level of featuring than last ad cycle.

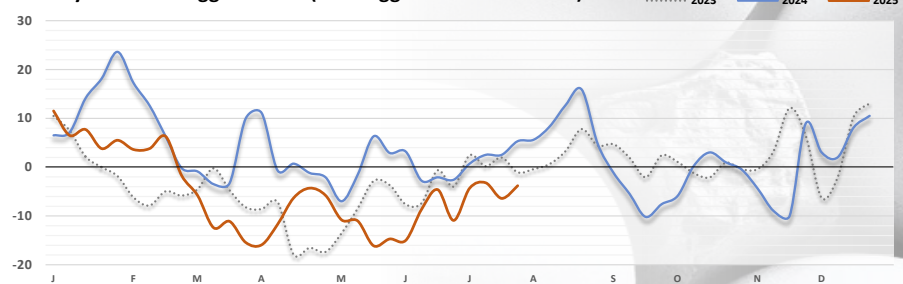
The overall shell egg inventory declined just under a half percent while the national inventory of Large class shell eggs declined 4.5%. Stocks of Large shell eggs in the key Midwest production region decreased 2.5% as eggs moved into retail channels to support

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)



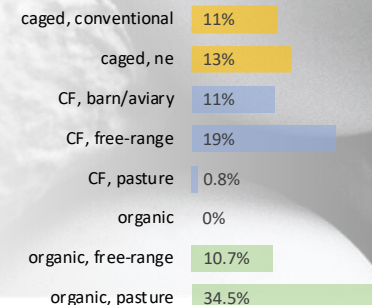
Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

## This Week's Retail Large Shell Egg Feature Summary

Advised Prices to Consumers at Major Retail Supermarkets

	White-Shell		Brown-Shell	
	Activity	Price	Activity	Price
<b>Caged</b>				
conventional	173	2.68	--	--
nutritionally-enhanced	182	3.66	21	3.99
<b>Cage-Free - Non-Organic</b>				
barn/aviary	147	3.67	21	3.99
free-range	--	--	292	5.18
pastured	--	--	13	6.99
<b>USDA Organic</b>				
organic	--	--	--	--
free-range	--	--	166	6.88
pastured	--	--	535	9.57

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



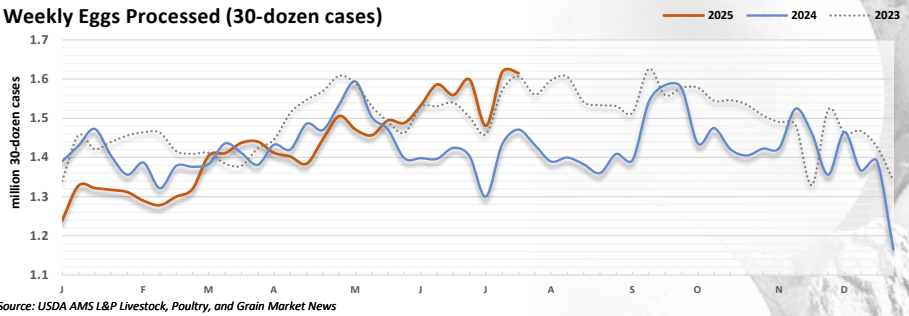
restocking following good movement over the recent holiday. The inventory share of Large class shell eggs declined 2% to a 45% share of all shell egg stocks on inventory at the start of the week. Stocks of cage-free eggs were up just over 5.5% as retail movement slowed following active promotions. Stocks of nutritionally-enhanced eggs swelled by 12% to support retail features breaking in the current cycle and the inventory of organic shell eggs was about unchanged. The inventory of breaking stock was unchanged. Total estimated table egg production gained a half percent from last week and was about unchanged from last year to a year-to-year deficit the equivalent of 9.5 million cases in total.

The average national wholesale price for breaking stock rose \$0.02 to \$1.90 per dozen with a steady undertone. Demand is light for light to moderate offerings with lighter-weight eggs most available. Supplies are moderate and processing schedules are full-time. Trading is slow to moderate. The volume of eggs processed last week was down slightly and the share of weekly table egg production was unchanged at 35%. The past two weeks have seen the highest back-to-back volume of eggs processed since October 2021 as some breakers continue to draw on imports to supplement domestic supply. Cage-free stock accounted for 35% of eggs processed last week, a 4.5% percent decline in share. Production of whole egg was down 6% while production of egg components increased with both whites and yolks up 9%. Dried egg production increased 14% and the production of inedible egg increased 2%. Breaking yields without inedible were down slightly to 41.38 pounds per case broken.

Wholesale prices for certified liquid whole eggs are mostly steady on a thin test. Demand is moderate to good for light offerings and light to moderate supplies. Trading is moderate. Wholesale prices for whole frozen eggs are down \$0.20 to \$2.10 per pound since last quoted and prices for frozen yolk are down \$0.05 to \$1.65 per pound. The undertone is steady with light demand and offerings. Supplies are light to moderate with slow trading. Prices for dried whole eggs are down \$0.07 to \$18.00 per pound and those for dried yolk are down \$0.03 to \$18.00 per pound. Dried albumen remains untested. The undertone is steady with moderate to good demand for light offerings. Supplies are light to very light and trading is moderate.

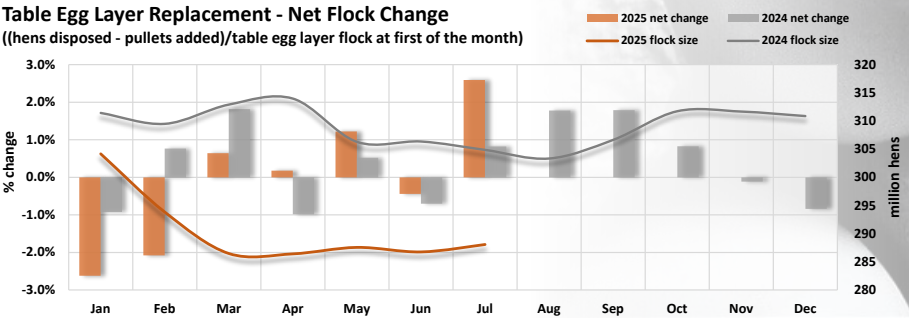
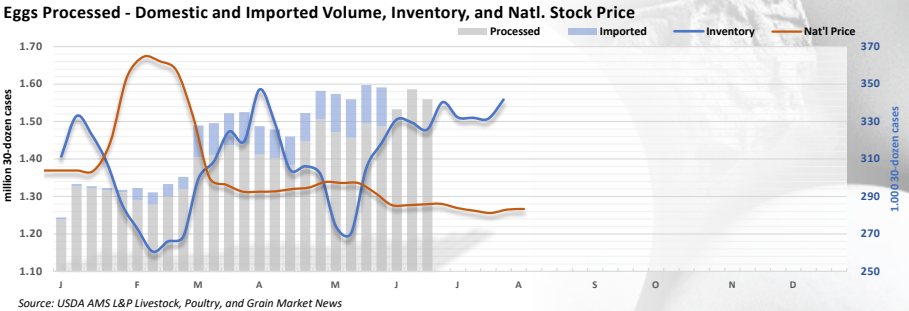
According to NASS, the May monthly volume of frozen eggs in storage increased 2% from April but remains 51% below the prior year. Stocks of whole frozen egg increased 10%, 46% below last year and the share of whole egg stocks gained 3% to a 44% share of total frozen stocks. Stocks of frozen yolk increased 4% and were 40% below the level from last year. Frozen egg whites gained 16% to a level 57% below last year. Stocks of unclassified eggs declined 6% from last month and were down 54% from last year. The share of unclassified frozen stocks declined 4% to a 46% share of total frozen stocks.

As of July 1, 2025, the estimated U.S. non-organic commercial cage-free table egg flock increased 3% to 113.8 million, 39.5% of the current U.S. table egg flock. This represents a 13% increase over the number of non-organic, cage-free table egg layers on July 1, 2024, and a 6.4% increase in the share of the total commercial table egg flock. The USDA certified organic table egg layer flock on July 1 was up one percent from June at 6.9% of the total layer flock. The ratio of caged to cage-free layers currently stands at 53.5/46.5 as compared to 54/46 last month and 60.5/39.5 last year.



Eggs Processed - Week-to-Week Change							
total	share	case yield*	whole	whites	yolks	dried	inedible
-0.2%	-0.1%	-0.18	-5.9%	8.8%	9.0%	14.3%	2.1%

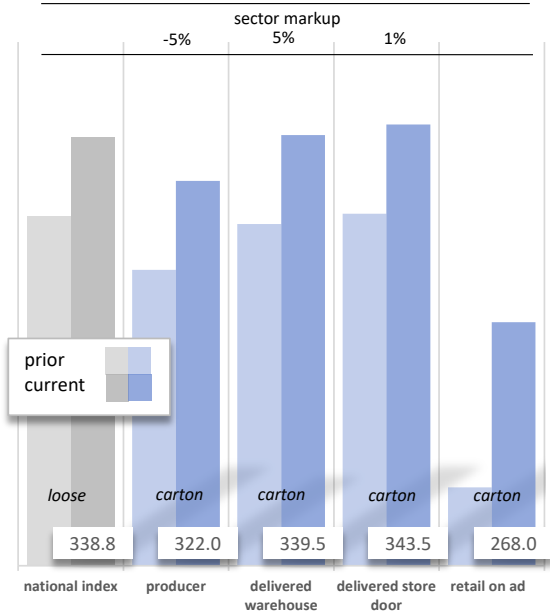
\* case yield w/ inedible in pounds per case.



## Shell Eggs Market Price Comparisons

(as of July 25, 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						
	25-Jul	% Change	18-Jul	11-Jul	4-Jul	27-Jun	20-Jun
<b>SHELL EGGS</b> (Large, White, conventional in cents per dozen)							
National, loose (negotiated; f.o.b. dock prices)	338.82	10%	308.61	270.26	256.24	253.80	272.54
California-compliant, loose, (negotiated delivered)	433.55	1%	429.05	360.31	337.89	322.95	308.50
Midwest, cartoned (formula sales; dlvr'd to warehouse)	339.50	11%	305.50	293.50	293.50	295.50	291.50
New York, cartoned (formula sales; dlvd to store)	370.00	3%	358.00	323.00	305.00	305.00	307.00
California-compliant, cartoned, benchmark	470.00	12%	418.00	384.00	375.00	355.00	345.00
<b>National Retail Shell Egg</b> (avg. ad price in dollars per dozen)							
Conventional Caged, Large, White	2.68	31%	2.05	3.64	3.57	2.60	3.60
UEP Cage-Free, Large, Brown	3.71	16%	3.19	3.25	3.19	3.07	3.99
<b>EGG PRODUCTS</b> (f.o.b. shipper dock prices)							
Breaking Stock (negotiated; dlvd prices cents per doz)	189.75	1%	188.00	177.75	184.50	192.25	205.00
Whole Frozen Egg (dollars per pound)	2.10		n/a	n/a	2.30	2.40	n/a
Whole Dried Eggs (dollars per pound)	18.00		n/a	n/a	n/a	n/a	n/a
Processed Share of Weekly Shell Egg Production	35.8%	-0.1%	35.9%	32.9%	35.5%	35.0%	35.6%
<b>SHELL EGG DEMAND INDICATOR</b> (no units)	-3.8	2.6	-6.4	-3.2	-4.3	-10.9	-4.6

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)	25-Jul	Change	18-Jul	2025 High		2025 Low	
National, loose (negotiated; f.o.b. dock prices)	338.8	▲ 10%	308.6	816.8	03-Mar	251.7	29-May
California-compliant, loose, (negotiated delivered)	433.6	▲ 1%	429.1	996.2	26-Feb	242.9	29-May
Midwest, cartoned (formula sales; dlvr'd to warehouse)	339.5	▲ 11%	305.5	841.5	28-Feb	288.5	30-May
New York, cartoned (formula sales; dlvd to store)	370.0	▲ 3%	358.0	853.0	25-Feb	300.0	29-May
California-compliant, cartoned, benchmark	470.0	▲ 12%	418.0	1035.0	28-Feb	345.0	05-Jun
Breaking Stock (negotiated; dlvd prices cents per doz)	189.8	▲ 1%	188.0	633.8	18-Feb	177.8	10-Jul
Whole Frozen Egg (dollars per pound)	2.10	■ 0%	n/a	5.31	28-Feb	2.10	25-Jul
Whole Dried Eggs (dollars per pound)	18.00	■ 0%	n/a	25.00	16-May	18.00	Jul 35
Natl Average Retail Ad Price - Conventional caged	2.68	▲ 31%	2.05	4.28	11-Apr	1.87	03-Jan
Natl Average Retail Ad Price - UEP Cage-free <sup>2</sup>	3.71	▲ 16%	3.19	7.99	21-Feb	2.50	17-Jan
Shell Egg Demand Indicator	-3.8	▲ 2.6	-6.4	11.5	02-Jan	-16.1	21-May

<sup>1</sup> mostly high; <sup>2</sup> non-organic



## U.S. Table Egg Layer Flock Estimates

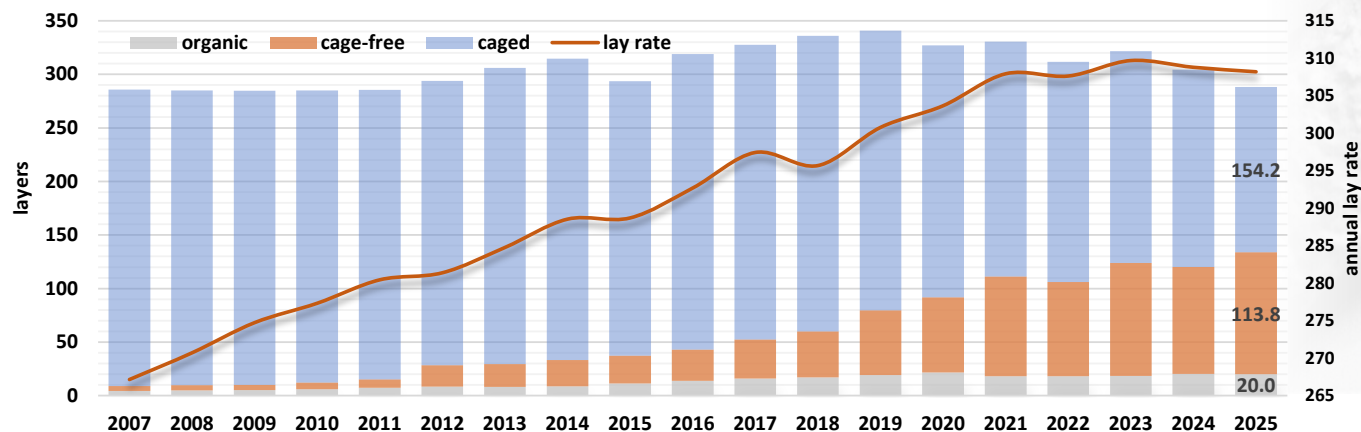
As of July 1, 2025	2025	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012
<b>Total U.S. Caged<sup>1</sup> Flock:</b>	<b>53.5%</b>	<b>58.9%</b>	<b>61.6%</b>	<b>65.9%</b>	<b>66.4%</b>	<b>72.0%</b>	<b>76.6%</b>	<b>82.2%</b>	<b>84.0%</b>	<b>86.6%</b>	<b>87.3%</b>	<b>89.5%</b>	<b>90.3%</b>	<b>90.4%</b>
Layers (millions)	154.2	184.0	197.7	205.3	219.4	235.5	261.0	276.1	275.1	276.1	256.1	281.6	276.4	265.5
<b>Total U.S. Cage-Free Flock:</b>	<b>46.5%</b>	<b>38.5%</b>	<b>38.6%</b>	<b>34.1%</b>	<b>33.6%</b>	<b>28.0%</b>	<b>23.4%</b>	<b>17.8%</b>	<b>16.0%</b>	<b>13.4%</b>	<b>12.7%</b>	<b>10.5%</b>	<b>9.7%</b>	<b>9.6%</b>
Layers (millions)	133.8	120.3	123.9	106.2	111.1	91.7	79.7	59.9	52.4	42.9	37.3	33.2	29.6	28.3
<b>NON-ORGANIC Cage-Free:</b>	<b>39.5%</b>	<b>32.0%</b>	<b>32.8%</b>	<b>28.2%</b>	<b>28.1%</b>	<b>21.4%</b>	<b>17.7%</b>	<b>12.8%</b>	<b>11.1%</b>	<b>9.1%</b>	<b>8.9%</b>	<b>7.8%</b>	<b>7.0%</b>	<b>6.7%</b>
Layers (millions)	113.8	99.9	105.4	88.0	92.9	69.9	60.3	42.9	36.4	29.0	26.0	24.5	21.4	19.8
▪ Barn/Aviary	33.9%	27.2%	30.2%	27.0%	26.9%	19.9%	15.9%	11.6%	10.0%	7.9%	7.7%	6.7%	6.0%	5.7%
Layers (millions)	97.7	84.5	97.1	84.1	89.0	65.1	54.1	39.0	32.9	25.3	22.5	21.0	18.5	16.9
▪ Free-Range	2.9%	2.5%	1.0%	0.8%	0.7%	0.9%	0.8%	0.4%	0.4%	0.5%	0.5%	0.5%	0.5%	0.6%
Layers (millions)	8.4	7.8	3.1	2.4	2.4	2.8	2.9	1.5	1.3	1.6	1.5	1.5	1.7	1.6
▪ Pastured	2.7%	2.4%	1.6%	0.5%	0.5%	0.6%	1.0%	0.7%	0.7%	0.7%	0.7%	0.6%	0.4%	0.4%
Layers (millions)	7.7	7.6	5.2	1.5	1.5	2.1	3.3	2.4	2.2	2.1	2.0	2.0	1.3	1.3
<b>USDA ORGANIC Cage-Free:</b>	<b>6.9%</b>	<b>6.5%</b>	<b>5.7%</b>	<b>5.8%</b>	<b>5.5%</b>	<b>6.7%</b>	<b>5.7%</b>	<b>5.1%</b>	<b>4.9%</b>	<b>4.4%</b>	<b>3.9%</b>	<b>2.8%</b>	<b>2.7%</b>	<b>2.9%</b>
Layers (millions)	20.0	20.3	18.5	18.2	18.2	21.8	19.4	17.0	16.0	13.9	11.4	8.7	8.2	8.5
▪ Organic	4.2%	4.0%	3.7%	3.8%	3.5%	4.6%	4.4%	3.9%	3.7%	3.4%	3.1%	2.2%	2.2%	2.5%
Layers (millions)	12.0	12.5	11.9	11.7	11.7	15.1	14.9	13.1	12.3	11.0	9.0	7.0	6.7	7.3
▪ Organic Free-Range	1.6%	1.4%	1.1%	1.2%	1.1%	1.2%	0.9%	0.8%	0.8%	0.7%	0.6%	0.4%	0.4%	0.3%
Layers (millions)	4.7	4.5	3.6	3.8	3.8	4.0	3.1	2.7	2.6	2.1	1.7	1.2	1.2	1.0
▪ Organic Pastured	1.2%	1.1%	0.9%	0.9%	0.8%	0.8%	0.4%	0.4%	0.4%	0.3%	0.2%	0.1%	0.1%	0.1%
Layers (millions)	3.3	3.3	3.0	2.7	2.7	2.7	1.4	1.2	1.2	0.8	0.7	0.4	0.4	0.3

Note: percentage of U.S. table egg layer flock as reported by NASS; past year annual numbers reflect flock as of the end of each year.

1 - battery and enriched systems

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

## U.S. Table Egg Layer Flock by Production System v. Avg Lay Rate (as of July 2025)



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

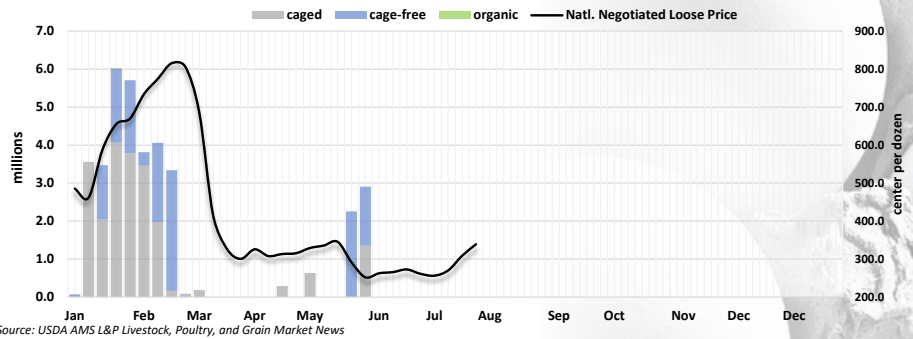
Egg Markets Overview

2025 Commercial Table Egg Flock HPAI Losses as of July 25, 2025

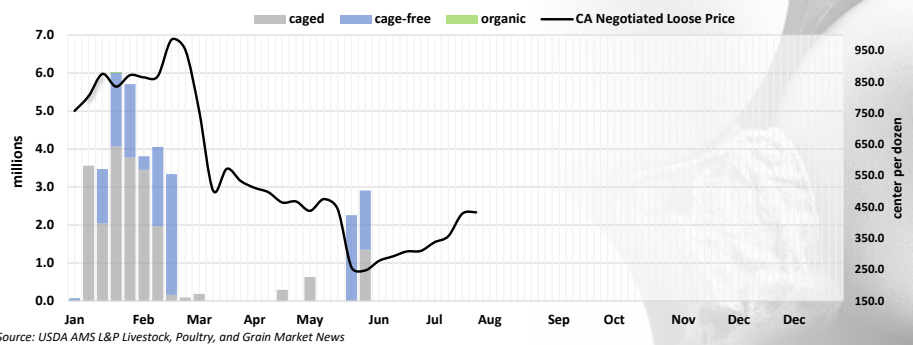
No new outbreaks of highly pathogenic avian influenza (HPAI) were reported over the past week in commercial table egg flocks. In 2025 to date, based on the latest data from APHIS, HPAI in commercial table egg layer flocks have resulted in the depopulation of 36.3 million birds. To date, USDA APHIS has confirmed 44 outbreaks in layer flocks in 10 states (AZ, CA, IA, IN, MO, NC, OH, PA, SD, and WA). The 36.3 million birds lost included 21.6 million (59.4%) in conventional caged systems and 14.8 million (40.6%) in cage-free systems. These losses represent 11.8% of the conventional caged layer flock and 14.6% of the non-organic cage-free flock on January 1, 2025.

Compared to January 1, the caged flock on July 1 was down 15.3% while the cage-free flock was up 12.7% and the organic table egg flock was down 1.6%.

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



2025 Table Egg Layer Losses by Production System v. California Cage-Free Loose Egg Price



2025 Table Egg Layer Losses by Production System

System	Loss	Share
Conventional Caged.....	21,572,620	59%
Cage-Free.....	14,765,280	41%
Organic.....	0	0.0%
Total	36,337,900	

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				5,164,300								5,480,900	15%
CA	75,200												75,200	0%
IA		241,600											241,600	1%
IN	2,987,200	3,591,400	187,200										6,765,800	19%
MO	3,910,300												3,910,300	11%
NC	3,314,900												3,314,900	9%
OH	7,845,300	5,408,800		293,300									13,547,400	37%
PA		2,060,100											2,060,100	6%
WA	307,800												307,800	1%
SD				633,900									633,900	2%
													-	0%
													-	0%
Total	18,757,300	11,301,900	187,200	927,200	5,164,300	-	-	-	-	-	-	-	36,337,900	

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

Share by State of Total 2025 Commercial Table Egg Layer Losses

