



Egg Markets Overview

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

April 25, 2025

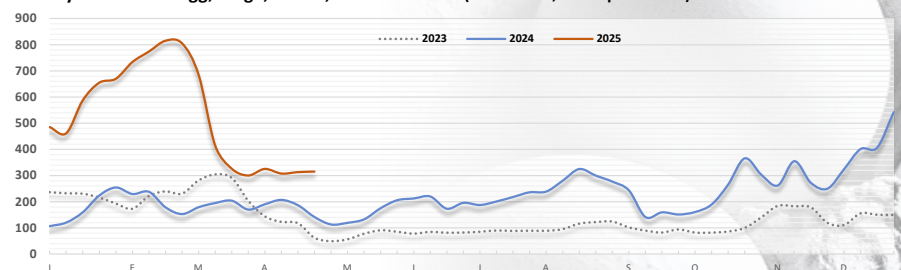
Negotiated wholesale prices for graded loose eggs are about steady to weak on mostly moderate demand for light to moderate offerings. Supplies are moderate and sufficient for trade needs on moderate trading. Wholesale prices for national trading of trucklot quantities of graded, loose, White Large shell eggs gained \$0.02 to \$3.15 per dozen with a steady undertone. The wholesale price on the New York market for formula trading of Large cartoned shell eggs delivered to retailers held steady at \$3.72 per dozen with a steady to 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 \$0.21 to \$5.28 per dozen with a weak undertone. Delivered prices on the California-compliant wholesale loose egg market increased \$0.03 to \$4.68 per dozen with a steady undertone.

Demand for shell eggs steadily improved in the weeks leading up to Easter but remained subdued and below the average for recent holiday marketing periods. Unlike past years, major retail grocers opted out of running their usual annual holiday shell egg promotions this year as supplies have only recently recovered sufficiently to maintain a consistent offering; a situation few were willing to jeopardize by incentivizing purchasing. As a result, consumers not only did not see traditional price deals for shell eggs but experienced the highest Easter prices on record despite the sharp price declines experienced in the wholesale market in recent weeks. 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. However, this did not deter many shoppers who sought to observe holiday family traditions despite unfavorable price levels. The preliminary estimate of shell egg movement for Easter indicates a 23% decline in eggs per household from the prior year (5.9 eggs per household compared to 7.7) with a 59% increase in the average retail feature price from 2024. Demand from egg products manufacturers was generally light as most opted to draw down stocks built up during the slow-down headed into the holiday to run schedules full to extended while they await for slowing carton demand to increase spot market offerings.

Feature activity for Large class shell eggs remains limited but a much broader mix of types is being seen as retailer confidence in maintaining a consistent supply grows. The average ad price for ads for conventional caged eggs rises \$0.06 to \$3.99 per dozen. Specialty shell eggs are seeing more variety in types on feature with nutritionally-enhance types returning to circulars this week along with noon-organic cage-free. With the passing of the Easter marketing period, demand is expected to proceed at a more consistent pace, providing an opportunity for production to return more closely to pre-HPAI levels.

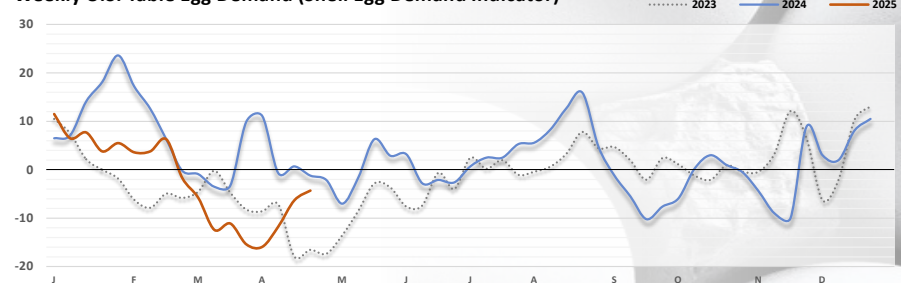
The overall shell egg inventory coming out of Easter weekend declined nearly 2.5% and the national inventory of Large class shell eggs was down just over 4%. Stocks of Large

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)



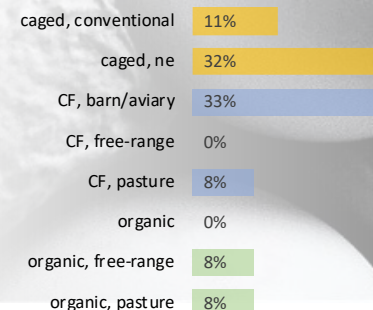
Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

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	21	3.99	--	--
nutritionally-enhanced	61	3.49	--	--
Cage-Free - Non-Organic				
barn/aviary	62	7.99	--	--
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.



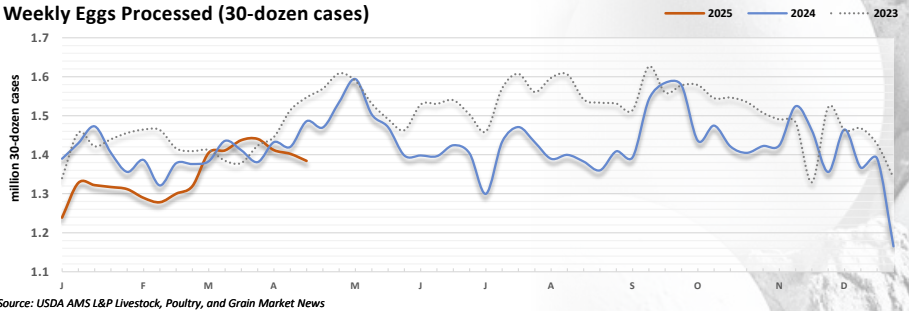
shell eggs in the key Midwest production region declined just over 6.5% as shell eggs cleared into marketing channels to support holiday purchasing for Easter. The inventory share of Large class shell eggs decreased one percent to a 50% share of all shell egg stocks on inventory at the start of the week. Stocks of cage-free eggs gained 4% while stocks of nutritionally-enhanced eggs increased 1.5%. Stocks of organic shell egg were up just over 4%. Breaking stock inventory rose a half percent as breakers slowed production into Easter weekend. Total estimated table egg production was unchanged from last week and down a half percent from last year to a year-to-year deficit the equivalent of 16.3 million cases in total.

The average national wholesale price for breaking stock increased \$0.05 to \$2.54 per dozen with a mixed undertone. Demand is in a full range for light offerings. Supplies are mostly moderate with full to extended schedules. Trading is moderate. The volume of eggs processed last week was down just over one percent and the share of weekly table egg production was down slightly to just over 31%. Cage-free stock accounted for 36% of eggs processed last week, up one percent in share. Production of whole egg declined nearly 3% while production of egg components both increased - whites by just over 4.5% and yolk by nearly 1.5%. Dried egg production declined 11% and production of inedible egg was down about 3%. Breaking yields without inedible improved a quarter pound to 41.75 pounds per case broken.

Wholesale prices for certified liquid whole eggs are firm to higher on good demand for light offerings. Trading is moderate to active. Wholesale prices on whole frozen eggs are unchanged at \$2.78 per pound while prices for frozen whites are down \$0.10 to \$2.30 per pound. The undertone is firm with a full range of demand for light to moderate offerings. Supplies and trading are moderate. Prices for dried eggs remain too few to report. The undertone is steady with moderate to good demand. Offerings and supplies are light to very light and trading is moderate.

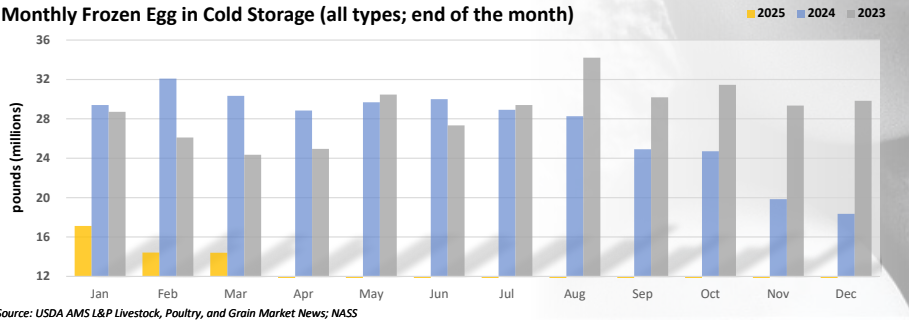
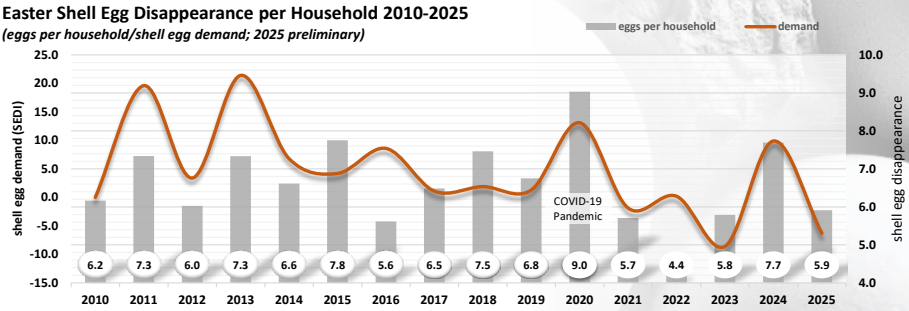
According to NASS, the March monthly volume of frozen eggs in storage was unchanged from February but was 52% below the prior year. This is the lowest level of egg products stocks recorded in at least the last 10 years. Stocks of whole frozen egg increased 2%, 57% below last year and the share of whole 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	inedible
-1.3%	-0.3%	0.23	-2.8%	4.7%	1.4%	-11.2%	-2.8%

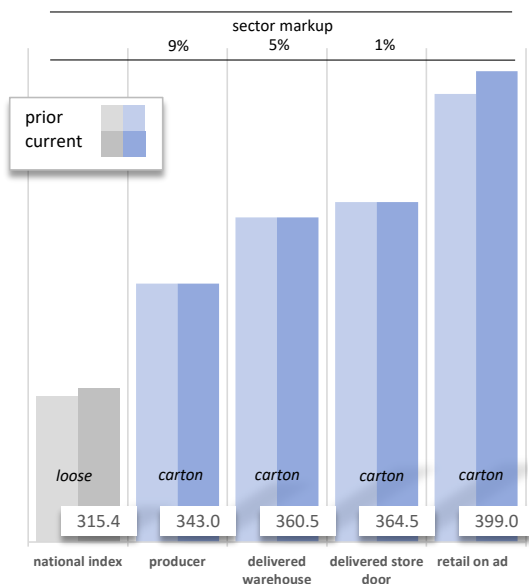
* case yield w/ inedible in pounds per case.



Shell Eggs Market Price Comparisons

(as of April 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

	25-Apr	% Change	18-Apr	11-Apr	4-Apr	28-Mar	21-Mar
SHELL EGGS (Large, White, conventional in cents per dozen)							
National, loose (negotiated; f.o.b. dock prices)	315.35	1%	313.27	307.77	325.93	300.38	326.57
California-compliant, loose, (negotiated delivered)	468.15	1%	465.06	497.70	510.94	533.57	572.96
Midwest, cartoned (formula sales; dlvd to warehouse)	360.50	0%	360.50	370.50	374.50	386.50	506.50
New York, cartoned (formula sales; dlvd to store)	372.00	0%	372.00	372.00	377.00	386.00	393.00
California-compliant, cartoned, benchmark	528.00	-4%	549.00	585.00	595.00	605.00	718.00
National Retail Shell Egg (avg. ad price in dollars per dozen)							
Conventional Caged, Large, White	3.99	2%	3.93	4.28	3.98	4.00	n/a
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)	254.00	2%	249.50	242.75	241.50	241.75	262.50
Whole Frozen Egg (dollars per pound)	2.78		n/a	2.78	2.90	n/a	2.86
Whole Dried Eggs (dollars per pound)			n/a	n/a	n/a	n/a	n/a
Processed Share of Weekly Shell Egg Production	31.2%	-0.3%	31.5%	31.6%	32.1%	31.5%	31.1%
SHELL EGG DEMAND INDICATOR (no units)							
	-4.3	2.0	-6.3	-11.7	-15.9	-15.4	-11.1

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

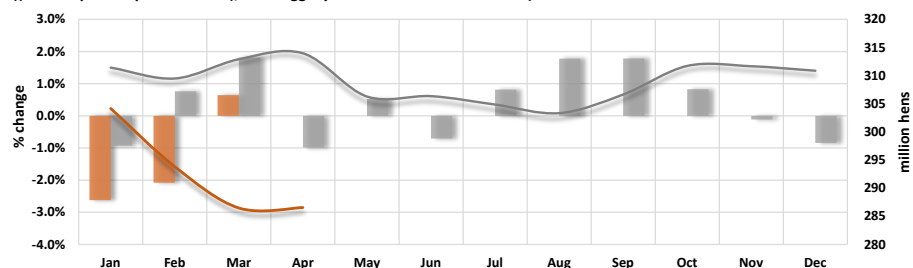
Key Shell Egg Markets Snapshot - 2025

(Large, White, Conventional Shell Eggs in cents per dozen)	25-Apr	Change	18-Apr	2025 High	2025 Low
National, loose (negotiated; f.o.b. dock prices)	315.4	1%	313.3	816.8	03-Mar
California-compliant, loose, (negotiated delivered)	468.2	1%	465.1	996.2	26-Feb
Midwest, cartoned (formula sales; dlvd to warehouse)	360.5	0%	360.5	841.5	28-Feb
New York, cartoned (formula sales; dlvd to store)	372.0	0%	372.0	853.0	25-Feb
California-compliant, cartoned, benchmark	528.0	-4%	549.0	1035.0	28-Feb
Breaking Stock (negotiated; dlvd prices cents per doz)	254.0	2%	249.5	633.8	18-Feb
Whole Frozen Egg (dollars per pound)	2.78	0%	n/a	5.31	28-Feb
Whole Dried Eggs (dollars per pound)	0.00	0%	n/a		
Natl Average Retail Ad Price - Conventional caged	3.99	2%	3.93	4.28	11-Apr
Natl Average Retail Ad Price - UEP Cage-free ²	n/a	0%	n/a	7.99	21-Feb
Shell Egg Demand Indicator	-4.3	2.0	-6.3	11.5	02-Jan

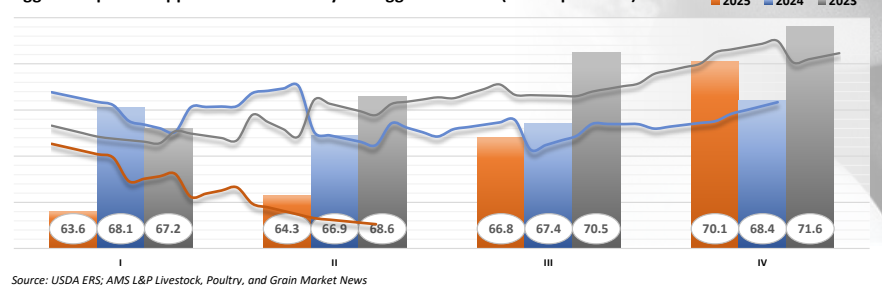
¹ mostly high; ² non-organic

Table Egg Layer Replacement - Net Flock Change

((hens disposed - pullets added)/table egg layer flock at first of the month)



Egg Per Capita Disappearance vs. Weekly Est. Egg Production (as of April 2025)



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

U.S. Table Egg Layer Flock Estimates

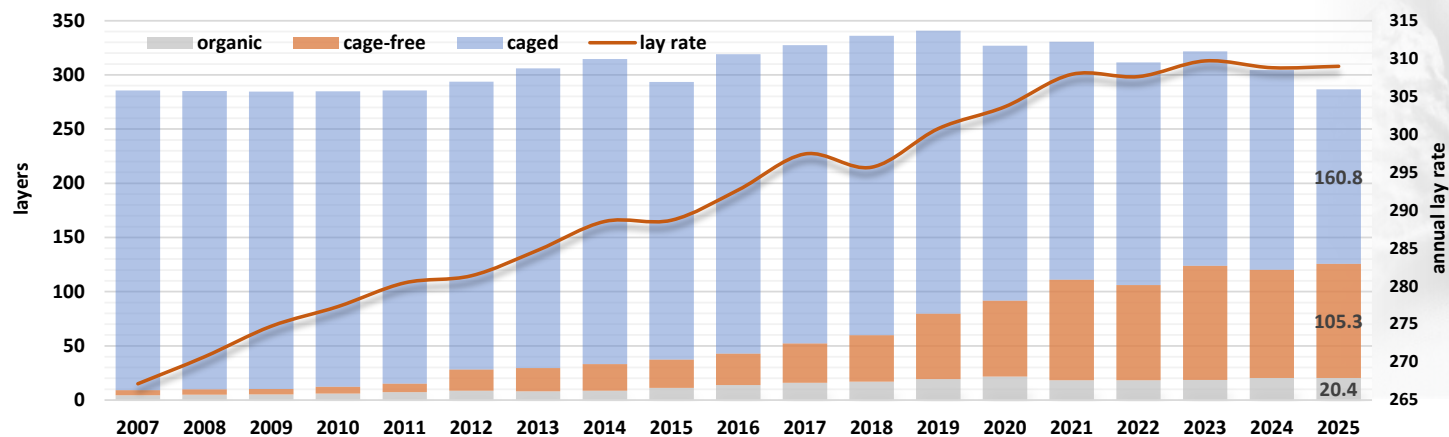
As of April 1, 2025	2025	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012
Total U.S. Caged¹ Flock:	56.1%	58.9%	61.6%	65.9%	66.4%	72.0%	76.6%	82.2%	84.0%	86.6%	87.3%	89.5%	90.3%	90.4%
Layers (millions)	160.8	184.0	197.7	205.3	219.4	235.5	261.0	276.1	275.1	276.1	256.1	281.6	276.4	265.5
Total U.S. Cage-Free Flock:	43.9%	38.5%	38.6%	34.1%	33.6%	28.0%	23.4%	17.8%	16.0%	13.4%	12.7%	10.5%	9.7%	9.6%
Layers (millions)	125.7	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
NON-ORGANIC Cage-Free:	36.8%	32.0%	32.8%	28.2%	28.1%	21.4%	17.7%	12.8%	11.1%	9.1%	8.9%	7.8%	7.0%	6.7%
Layers (millions)	105.3	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	31.4%	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)	89.9	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	2.7%	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)	7.8	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	2.6%	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)	7.6	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
USDA ORGANIC Cage-Free:	7.1%	6.5%	5.7%	5.8%	5.5%	6.7%	5.7%	5.1%	4.9%	4.4%	3.9%	2.8%	2.7%	2.9%
Layers (millions)	20.4	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	4.4%	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)	12.6	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)	4.5	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 April 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 April 25, 2025

(no outbreaks reported this week)

In 2025 to date, HPAI in commercial table egg layer flocks have resulted in the depopulation of 30.6 million birds. To date, USDA APHIS has confirmed 41 outbreaks in layer flocks in 9 states (AZ, CA, IA, IN, MO, NC, OH, PA, and WA). The 30.6 million birds lost included 19.6 million (64%) in conventional caged systems, 11.0 million (36%) in cage-free systems, and 26,000 organic (0.1%). These losses represent 10.8% 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 March 1 was down 12.5% while the cage-free and organic flocks increased – by 4.4% and 0.3%, respectively. As of the end of March, nearly two-thirds of layer losses have occurred in caged systems. To date, Ohio has borne the brunt of 2025 outbreaks with 13.5 million (44%) of losses occurring in Ohio flocks.

2025 Table Egg Layer Losses by Production System

System	Loss	Share
Conventional Caged....	19,584,520	64%
Cage-Free	10,955,480	36%
Organic.....	26,100	0.1%
Total	30,566,100	

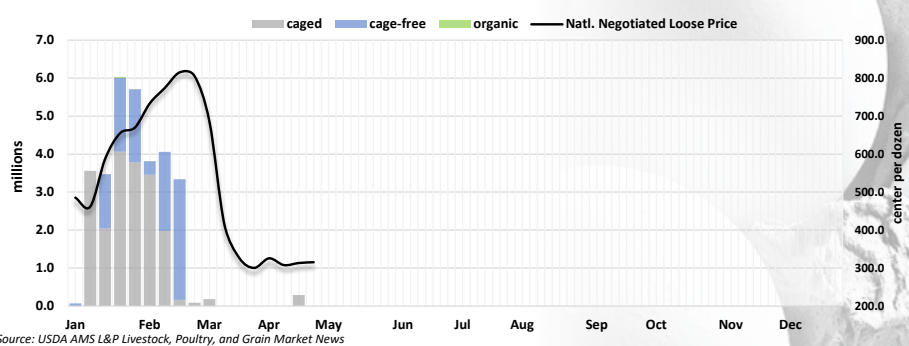
2025 Table Egg Layer Losses

(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	44%
PA		2,060,400											2,060,400	7%
WA	307,800												307,800	1%
													-	0%
													-	0%
													-	0%
													-	0%
Total	18,783,400	11,302,200	187,200	293,300	-	-	-	-	-	-	-	-	30,566,100	

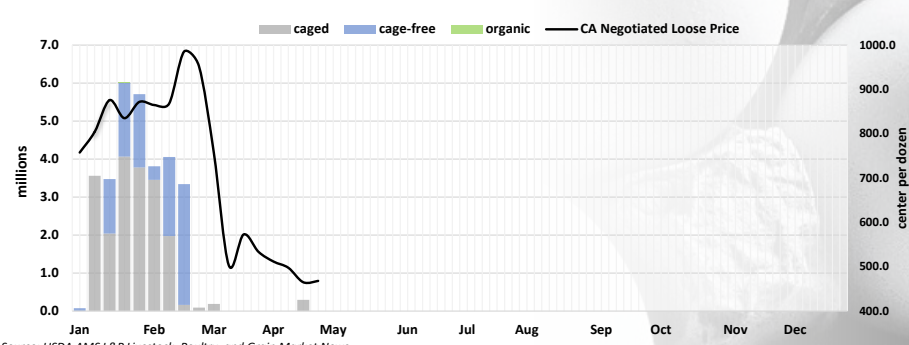
Source: USDA AMS Livestock & Poultry Program, Livestock, Poultry, and Grain Market News Division

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 Table Egg Layer Losses by Production System v. California 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

