

USDA Egg Markets Overview

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

February 14, 2025

Negotiated wholesale prices for graded loose eggs continued to move higher with a firm undertone. Demand is in a full range with retail business seeing the most interest. Offerings are very light to light with little chance for improvement in the near-term as highly pathogenic avian influenza (HPAI) continues to impact productive flocks. Supplies remain very light to moderate. Trading is active for available offerings. Prices for national trading of trucklot quantities of graded, loose, White Large shell eggs increased \$0.40 to \$7.74 per dozen with a higher undertone. The wholesale price on the New York market for formula trading of Large cartoned shell eggs delivered to retailers rose \$0.28 to \$8.23 per dozen with a firm undertone. In the major Midwest production region, wholesale prices for Large, white, shell eggs delivered to warehouses increased \$0.34 to \$7.81 per dozen with a firm undertone while prices paid to producers for Large cartoned shell eggs increased \$0.39 to \$7.64 per dozen. The California benchmark for Large shell eggs rose \$0.06 to \$9.17 per dozen with a fully steady undertone. Delivered prices on the California-compliant wholesale loose egg market increased \$0.03 to \$8.68 per dozen with a mostly firm undertone.

Shell egg demand was about unchanged over the past week and remains strong relative to the current supply situation. Outbreaks of HPAI in commercial table egg layer flocks continue to slow flock recovery efforts. Supply remains unbalanced and dependent upon the impact of HPAI on source farms as marketers whose regular suppliers have been impacted are working to find new short-term supply sources in a very competitive market atmosphere. Shell egg availability remains limited and inconsistent in many retail markets with affected grocers employing steps to limit consumer purchasing to stretch their existing supplies. According to the U.S. Bureau of Labor, in January, the Consumer Price Index for eggs increased 15.2%, 153% over the year ago level, with an average price of \$4.95 per dozen, up \$0.81 per dozen from last month. Demand from egg products manufacturers declined sharply following last week's sharp price spikes as those that were caught short stepped in, covered their needs, and stepped back out. Most have returned to operating day-to-day as they await improvements in the supply situation.

Feature activity for conventional caged Large shell eggs is not recorded this week as grocers are limiting shell egg advertising to maintain a consistent supply. The pace of specialty shell egg featuring remains very limited and largely focused this week on free-range, non-organic types. Most feature activity is in the Northeast this cycle with limited promotions in the Northwest. Feature activity for [UEP-defined cage-free](#) shell eggs is not recorded this week and the price spread on feature between 12-packs of Large caged eggs and UEP cage-free eggs is not calculated this week. Grocers continue to avoid incentivizing shell egg movement as they work to maintain a consistent supply to their customers in the current environment.

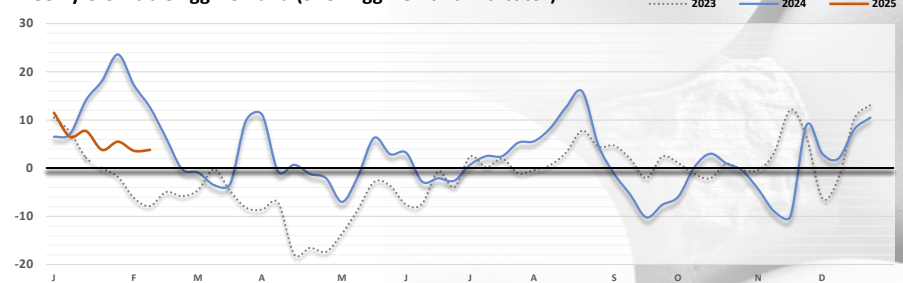
The overall shell egg inventory was unchanged while the national inventory of Large class

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					caged, conventional	0%
conventional	--	--	--	--	caged, ne	0%
nutritionally-enhanced	--	--	--	--	CF, barn/aviary	0%
Cage-Free - Non-Organic					CF, free-range	77%
barn/aviary	--	--	--	--	CF, pasture	8%
free-range	--	--	148	5.89	organic	0%
pastured	--	--	15	7.99	organic, free-range	8%
USDA Organic					organic, pasture	8%
organic	--	--	--	--		
free-range	--	--	15	6.29		
pastured	--	--	15	6.46		

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

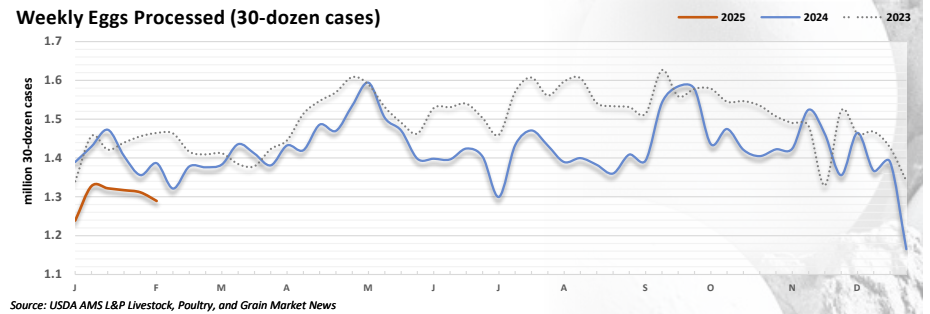
shell eggs posted a slight increase. Stocks of Large shell eggs in the key Midwest region gained just over one percent as supply and demand balanced over the past week. The inventory share of Large class shell eggs remained at a 50% share of all shell egg stocks on inventory at the start of the week. Stocks of cage-free eggs gained 4% while stocks of nutritionally-enhanced eggs decreased 4%. Stocks of organic shell eggs were down 2% and breaking stock inventory declined 4.5% to its lowest level since April 2017 as breakers are forced to draw down their stocks to maintain reduced schedules given continued very limited spot market offerings. Total estimated table egg production is about unchanged from last week and down slightly from last year to a year-to-year deficit the equivalent of 5.3 million cases in total. According to the U.S. Bureau of Labor, in January, the Producer Price Index (a measure of average prices received by producers of domestically produced goods and services), for Large shell eggs increased 48.8% to a level 300.7% over the level in January 2024.

Wholesale prices for breaking stock in the Central States rose \$0.06 to \$6.46 per dozen with a firm undertone. Demand and offerings are very light to light with very light to, at times, moderate supplies. Movement is generally moderate and breaking schedules are reduced and running 7% behind year ago levels. The volume of eggs processed last week decreased just over 1.5% while the share of weekly table egg production remains about 28%. Production of whole egg gained just under 3.5% while component production was down – whites by 4% and yolk by just over 10%. Dried egg production increased sharply, up 20.5% following several weeks of decline. Production of inedible egg was down nearly 3%. Breaking yields without inedible improved about a half pound to 42.00 pounds per case broken.

Wholesale prices for certified liquid whole eggs are sharply higher again this week with a mostly higher undertone. Demand is good, best for whole egg, for light to very light offerings and trading is moderate to active. Wholesale prices on whole frozen eggs are \$1.33 higher at \$4.44 with frozen whites not tested and last quoted at \$3.50 per pound. The undertone is firm with a full range of demand for light to very light offerings. Supplies are mostly light with moderate to active trading. Prices for whole dried eggs remain too few to report with those for whole dried egg last quoted at \$9.60 per pound and those for dried yolk at \$7.40 per pound. The undertone is higher with good to very good demand for light to very light offerings and supplies. Trading is moderate to active.

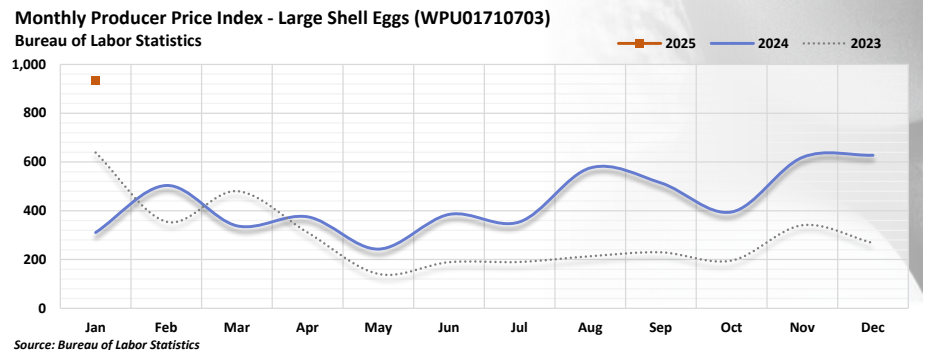
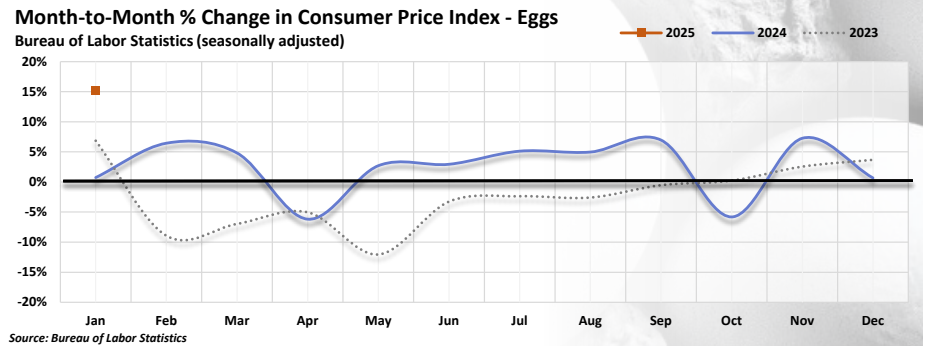
According to NASS, the December monthly volume of frozen eggs in storage declined 7% from November, 38% below the December 2023 level. This is the lowest level of egg products stocks recorded in the last 10 years. Stocks of whole frozen egg decreased 5%, 33% below last year and the share of whole egg stocks gained 1% to a 45% share of total frozen stocks. Stocks of frozen yolk declined 12% but were 61% under last year's level while stocks of frozen egg whites were down 6%, 44% below year ago levels. Stocks of unclassified eggs declined 9% from last month and 40% from last year. The share of unclassified frozen stocks fell one percent to a 45% share of total frozen stocks.

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



Eggs Processed - Week-to-Week Change							
total	share	case yield*	whole	whites	yolks	dried	inedible
-1.7%	-0.4%	0.55	3.4%	-4.0%	-10.3%	20.5%	-2.8%

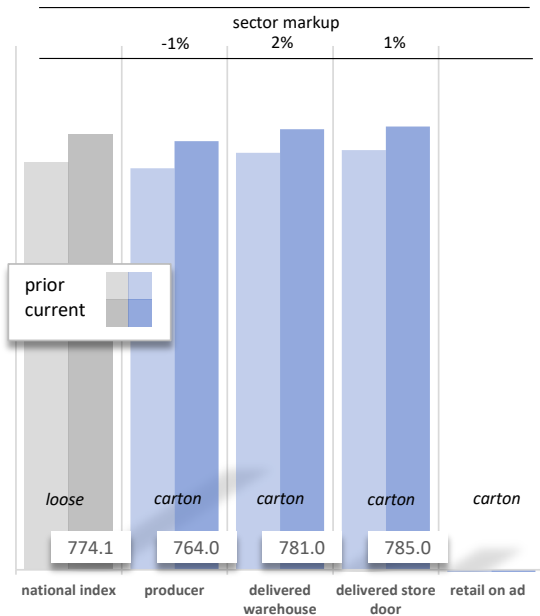
* case yield w/ inedible in pounds per case.



Shell Eggs Market Price Comparisons

(as of February 14, 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

	14-Feb	% Change	Recent History				
			7-Feb	31-Jan	24-Jan	17-Jan	10-Jan
SHELL EGGS (Large, White, conventional in cents per dozen)							
National, loose (negotiated; f.o.b. dock prices)	774.06	5%	733.82	670.00	655.00	587.50	461.71
California-compliant, loose, (negotiated delivered)	868.24	0%	865.00	872.00	835.33	876.00	804.41
Midwest, cartoned (formula sales; dlvr'd to warehouse)	781.00	5%	747.00	703.00	649.00	606.00	591.00
New York, cartoned (formula sales; dlvd to store)	823.00	4%	795.00	763.00	724.00	672.00	625.00
California-compliant, cartoned, benchmark	917.00	1%	911.00	897.00	897.00	897.00	897.00
National Retail Shell Egg (avg. ad price in dollars per dozen)							
Conventional Caged, Large, White	n/a		n/a	2.68	n/a	2.24	2.36
UEP Cage-Free, Large, Brown	n/a		n/a	n/a	2.50	2.64	2.99
EGG PRODUCTS (f.o.b. shipper dock prices)							
Breaking Stock (negotiated; dlvd prices cents per doz)	646.00	1%	640.00	390.00	305.00	305.00	305.00
Whole Frozen Egg (dollars per pound)	4.44	43%	3.11	3.11	2.77	2.69	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	27.8%	-0.4%	28.1%	28.1%	28.1%	28.1%	26.2%
SHELL EGG DEMAND INDICATOR (no units)							
	3.8	0.2	3.6	5.5	3.8	7.7	6.5

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)	14-Feb	Change	07-Feb	2025 High	2025 Low
National, loose (negotiated; f.o.b. dock prices)	774.1	▲ 5%	733.8	774.1	461.7
California-compliant, loose, (negotiated delivered)	868.2	▲ 0%	865.0	876.0	800.0
Midwest, cartoned (formula sales; dlvr'd to warehouse)	781.0	▲ 5%	747.0	781.0	575.0
New York, cartoned (formula sales; dlvd to store)	823.0	▲ 4%	795.0	823.0	604.0
California-compliant, cartoned, benchmark	917.0	▲ 1%	911.0	917.0	897.0
Breaking Stock (negotiated; dlvd prices cents per doz)	646.0	▲ 1%	640.0	646.0	305.0
Whole Frozen Egg (dollars per pound)	4.44	▲ 43%	3.11	4.44	2.69
Whole Dried Eggs (dollars per pound)	n/a	■ 0%	n/a		
Natl Average Retail Ad Price - Conventional caged	n/a	■ 0%	n/a	2.68	1.87
Natl Average Retail Ad Price - UEP Cage-free ²	n/a	■ 0%	n/a	2.99	2.50
Shell Egg Demand Indicator	3.8	▲ 0.2	3.6	11.5	3.6

¹ mostly high; ² non-organic

2025 Commercial Table Egg Flock HPAI Losses

Outbreaks of highly pathogenic avian influenza (HPAI) in commercial table egg layer flocks that resulted in the depopulation of 13.2 million birds in December 2024 continue into the first 6 weeks of 2025. As of this week, 30 APHIS-confirmed outbreaks in 8 states (AZ, CA, NC, OH, PA, MO, IN, and WA) have resulted in the loss of 23.5 million birds – 17.3 million (74%) in conventional caged systems, 6.1 million (26%) in cage-free systems, and 26,000 organic (0.1%). These losses represent 9.5% of the conventional caged layer flock, 6.1% of the non-organic cage-free flock, and 0.1% of the organic flock on January 1, 2025.

The impact of these losses in the marketplace continues to be influenced by the timing of the losses relative to demand patterns, the type of production systems affected, legislated restraints in certain states, and the intended use of the production either for in-shell or egg products use with most impact currently being felt in the retail cartoned sector.

2025 Table Egg Layer Losses by Production System

System	Loss	Share
Conventional Caged....	17,305,550	74%
Cage-Free.....	6,141,050	26%
Organic.....	26,100	0.1%
Total	23,472,700	

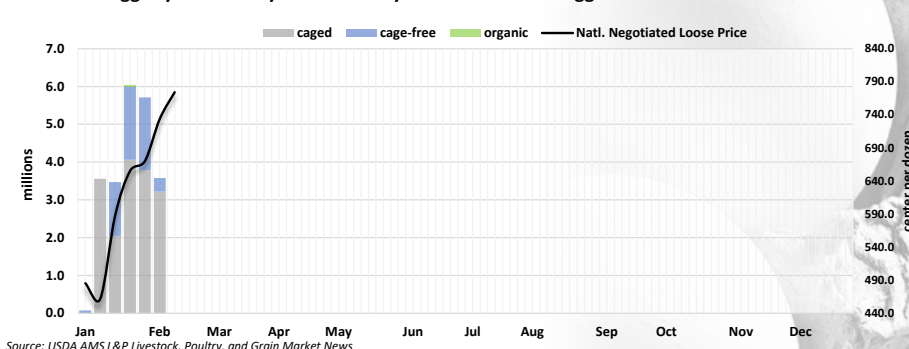
2025 Table Egg Layer Losses

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

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Totals
AZ	316,600												316,600
CA	75,200												75,200
IN	3,013,300	912,000											3,925,300
MO	3,910,300												3,910,300
NC	3,314,900												3,314,900
OH	7,911,300	1,642,300											9,553,600
WA	307,800												307,800
PA		2,069,000											2,069,000
													-
													-
													-
Total	18,849,400	4,623,300											23,472,700

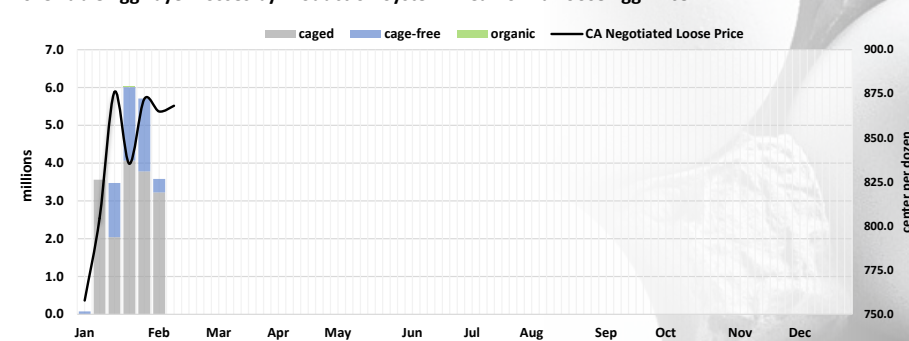
Source: USDA AMS Livestock & Poultry Program, Livestock, Poultry, and Grain Market News Division

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



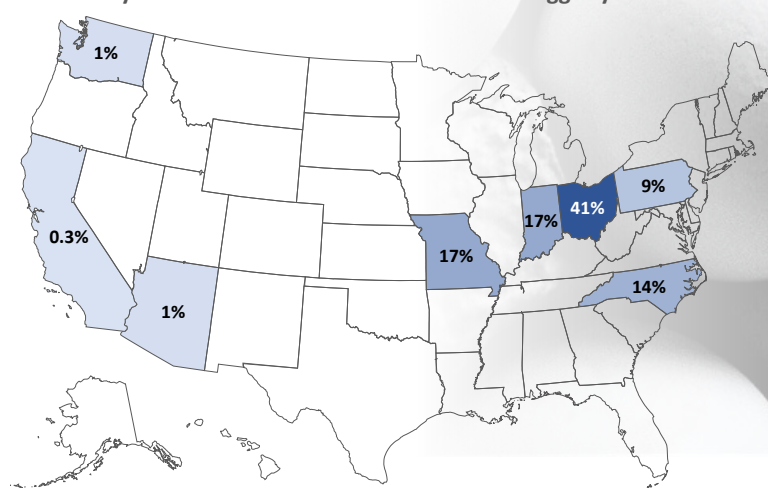
Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

2025 Table Egg Layer Losses by Production System v. California 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



Egg Markets Overview