



Egg Markets Overview

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

April 18, 2025

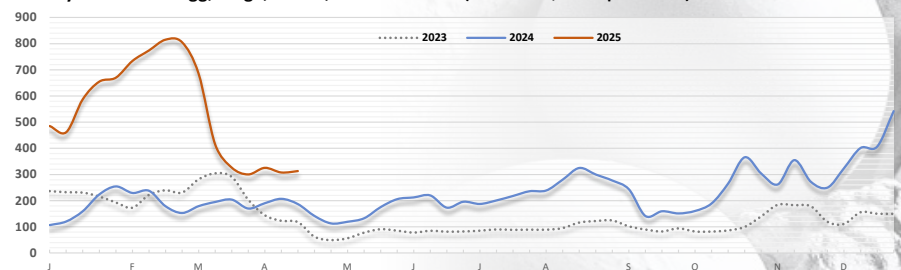
Negotiated wholesale prices for graded loose eggs are steady to weak on light to moderate demand for light to moderate offerings. Supplies are moderate and sufficient for trade needs on moderate trading. Wholesale prices for national trading of trucklot quantities of graded, loose, White Large shell eggs gained \$0.06 to \$3.13 per dozen with a weak 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 weak undertone. In the major Midwest production region, wholesale prices for Large, white, shell eggs delivered to warehouses decreased \$0.10 to \$3.65 per dozen with a weak undertone while prices paid to producers for Large cartoned shell eggs declined \$0.10 to \$3.43 per dozen. The California benchmark for Large shell eggs declined \$0.36 to \$5.49 per dozen with a weak undertone. Delivered prices on the California-compliant wholesale loose egg market decreased \$0.33 to \$4.65 per dozen with a weak undertone.

Demand for shell eggs improved into the week ahead of Easter Sunday, driven more by holiday family traditions than price. Despite the improvement, overall demand remains subdued this year and lags behind levels of recent years. Major retail grocers have 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 are willing to jeopardize by running features. As a result, consumers are not seeing the usual price incentives and what few they are seeing are only relatively low in contrast with recent record price levels and not with the levels of past Easters. 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. Demand from egg products manufacturers was light to fairly good as some are already anticipating a decline in carton demand as the holiday passes as they look to rebuild their stocks – now light to moderate. Most breaking lines have been slowed in preparation for the holiday. Most have opted to draw from owned stocks while they await further development in the carton trade.

Feature activity for Large class shell eggs is limited this Easter with no major retailers running promotions this year as supplies have only recently recovered to supportable levels. The average ad price for ads for conventional caged eggs is down \$0.35 to \$3.93 per dozen on a limited test. A few small grocery chains are featuring Jumbo and Medium class shell eggs as an alternative to the popular Large class. Specialty shell eggs are lightly tested. The Easter marketing period has arrived with grocers cautious about using incentives to encourage purchasing and satisfied to just meet basic consumer needs.

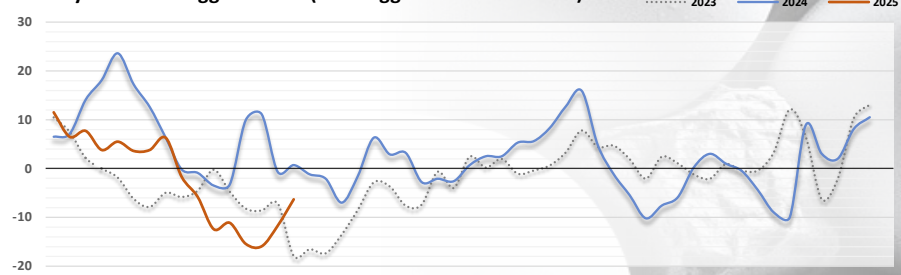
The overall shell egg inventory headed into Easter weekend drew down just over 5.5% and the national inventory of Large class shell eggs declined just over 8.5%. Stocks of Large shell eggs in the key Midwest production region declined 14% as shell eggs cleared into marketing channels to support holiday purchasing for Easter. The inventory share 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	313	3.93	--	--
nutritionally-enhanced	--	--	--	--
Cage-Free - Non-Organic				
barn/aviary	--	--	--	--
free-range	--	--	--	--
pastured	--	--	15	7.99
USDA Organic				
organic	--	--	15	6.49
free-range	--	--	--	--
pastured	--	--	15	9.69

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

caged, conventional	87%
caged, ne	0%
CF, barn/aviary	0%
CF, free-range	0%
CF, pasture	4%
organic	4%
organic, free-range	0%
organic, pasture	4%

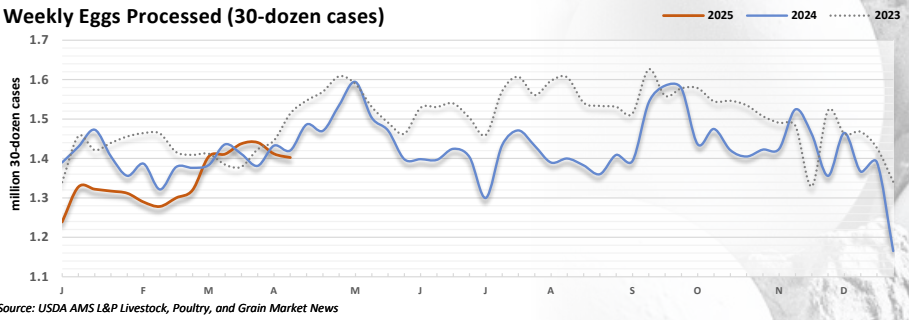
class shell eggs decreased 1.5% to a 51% share of all shell egg stocks on inventory at the start of the week. Stocks of cage-free eggs declined one percent while stocks of nutritionally-enhanced eggs decreased nearly 23.5%. Stocks of organic shell egg gained one percent. Breaking stock inventory decreased about 7.5% as breakers drew from stocks to run full to reduced schedules ahead of the holiday production disruption. 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 15 million cases in total.

The average national wholesale price for breaking stock increased \$0.07 for the week to \$2.50 per dozen with a mixed undertone. Demand is moderate to fairly good with interest in rebuilding stocks drawn down by recent reduced spot market offerings due to holiday carton demand. Offerings and supplies are light to moderate and trading is moderate. Schedules vary in preparation for the approaching holiday but are mostly full-time. The volume of eggs processed last week was down just over a half percent and the share of weekly table egg production was about unchanged at 31.5%. Cage-free stock accounted for 35% of eggs processed last week, unchanged in share. Production of whole egg declined 2% while production of egg components declined, whites by just over 4% and yolk by nearly 2%. Dried egg production declined nearly 8% and production of inedible egg was down slightly. Breaking yields without inedible declined nearly a three-quarters of a pound to 41.52 pounds per case broken.

Wholesale prices for certified liquid whole eggs are lower on moderate to good demand for light to moderate offerings. Trading is moderate. Wholesale prices on whole frozen eggs are too few to report and last quoted at \$2.78 per pound as are prices for frozen whites last quoted at \$2.40 per pound. The undertone is steady to firm with light to moderate demand and offerings. Supplies are moderate with slow to moderate trading. Prices for dried eggs remain too few to report. The undertone is steady to firm with moderate to good demand. Offerings and supplies are light to very light and trading is moderate to instances active.

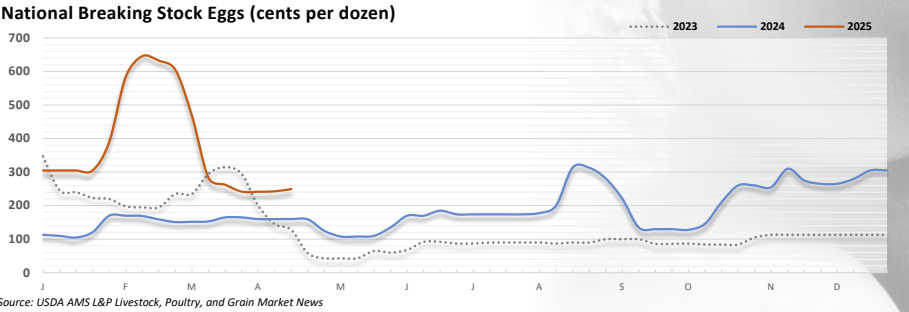
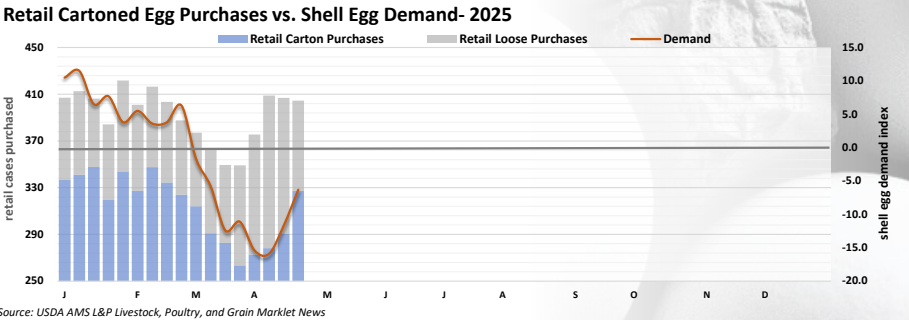
According to NASS, the February monthly volume of frozen eggs in storage declined 16% from the prior month, 55% below the prior year level. This is the lowest level of egg products stocks recorded in at least the last 10 years. Stocks of whole frozen egg decreased 24%, 61% below last year and the share of whole egg stocks declined 4% to a 39% share of total frozen stocks. Stocks of frozen yolk decreased 23% and were 39% under last year's level. This is the lowest level of yolk stocks ever recorded. Frozen egg whites were the only egg products that saw an increase, up 10% but 58% below last year. Stocks of unclassified eggs declined 13% from last month and were down 50% from last year. The share of unclassified frozen stocks increased 2% to a 52% share of total frozen stocks.

As of March 1, 2025, the estimated U.S. non-organic commercial cage-free table egg flock increased 3% to 105.4 million, 37% of the current U.S. table egg flock. This represents a one percent decline from the number of non-organic, cage-free table egg layers in March 2024. but a 3% increase in their share of the total U.S. table egg flock.



Eggs Processed - Week-to-Week Change							
total	share	case yield*	whole	whites	yolks	dried	inedible
-0.7%	-0.1%	-0.70	-2.0%	-4.2%	-1.7%	-7.8%	-0.3%

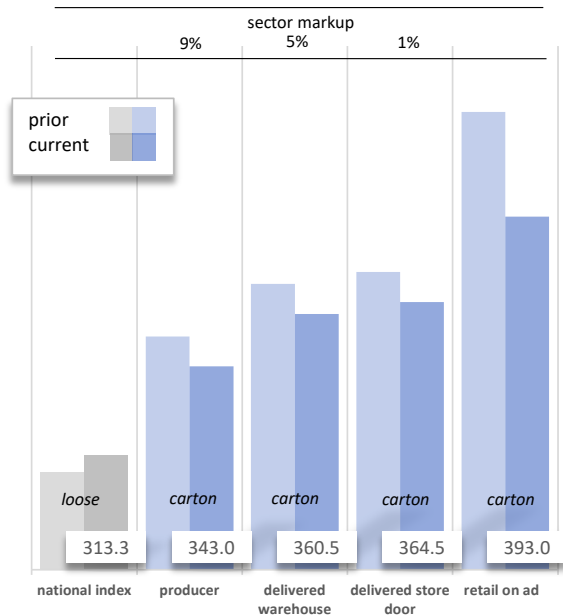
* case yield w/ inedible in pounds per case.



Shell Eggs Market Price Comparisons

(as of April 18, 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

	18-Apr	% Change	11-Apr	4-Apr	28-Mar	21-Mar	14-Mar
SHELL EGGS <i>(Large, White, conventional in cents per dozen)</i>							
National, loose <i>(negotiated; f.o.b. dock prices)</i>	313.27	2%	307.77	325.93	300.38	326.57	415.27
California-compliant, loose, <i>(negotiated delivered)</i>	465.06	-7%	497.70	510.94	533.57	572.96	503.50
Midwest, cartoned <i>(formula sales; dlvr'd to warehouse)</i>	360.50	-3%	370.50	374.50	386.50	506.50	746.50
New York, cartoned <i>(formula sales; dlvd to store)</i>	372.00	0%	372.00	377.00	386.00	393.00	478.00
California-compliant, cartoned, benchmark	549.00	-6%	585.00	595.00	605.00	718.00	948.00
National Retail Shell Egg <i>(avg. ad price in dollars per dozen)</i>							
Conventional Caged, Large, White	3.93	-8%	4.28	3.98	4.00	n/a	n/a
UEP Cage-Free, Large, Brown	n/a		n/a	n/a	n/a	n/a	n/a
EGG PRODUCTS <i>(f.o.b. shipper dock prices)</i>							
Breaking Stock <i>(negotiated; dlvd prices cents per doz)</i>	249.50	3%	242.75	241.50	241.75	262.50	282.75
Whole Frozen Egg <i>(dollars per pound)</i>	n/a		2.78	2.90	n/a	2.86	4.86
Whole Dried Eggs <i>(dollars per pound)</i>	n/a		n/a	n/a	n/a	n/a	n/a
Processed Share of Weekly Shell Egg Production	31.3%	-0.1%	31.4%	32.0%	31.8%	31.3%	31.2%
SHELL EGG DEMAND INDICATOR <i>(no units)</i>							
	-6.3	5.4	-11.7	-15.9	-15.4	-11.1	-12.4

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)	18-Apr	Change	11-Apr	2025 High		2025 Low	
National, loose (negotiated; f.o.b. dock prices)	313.3	▲ 2%	307.8	816.8	03-Mar	292.3	26-Mar
California-compliant, loose, (negotiated delivered)	465.1	▼ -7%	497.7	996.2	26-Feb	462.3	17-Apr
Midwest, cartoned (formula sales; dlvr'd to warehouse)	360.5	▼ -3%	370.5	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	549.0	▼ -6%	585.0	1035.0	28-Feb	549.0	10-Apr
Breaking Stock (negotiated; dlvd prices cents per doz)	249.5	▲ 3%	242.8	633.8	18-Feb	238.8	07-Apr
Whole Frozen Egg (dollars per pound)	n/a	■ 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	3.93	▼ -8%	4.28	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	-6.3	▲ 5.4	-11.7	11.5	02-Jan	-15.9	02-Apr

¹ mostly high; ² non-organic

2025 Commercial Table Egg Flock HPAI Losses as of April 18, 2025

An outbreak of highly pathogenic avian influenza (HPAI) was reported this week in a commercial table egg flock in Darke County, Ohio, the first HPAI outbreak since March 4. 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....	19,583,220	64%
Cage-Free.....	10,955,480	36%
Organic.....	26,100	0.1%
Total	30,564,800	

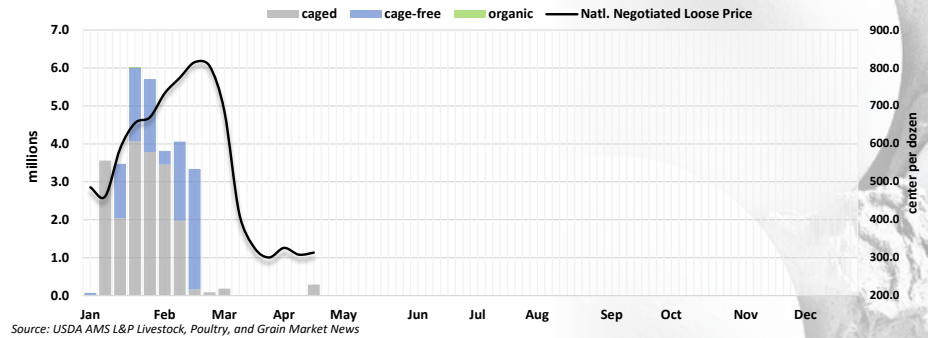
2025 Table Egg Layer Losses

(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		292,000									13,546,100	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	292,000	-	-	-	-	-	-	-	-	30,564,800	

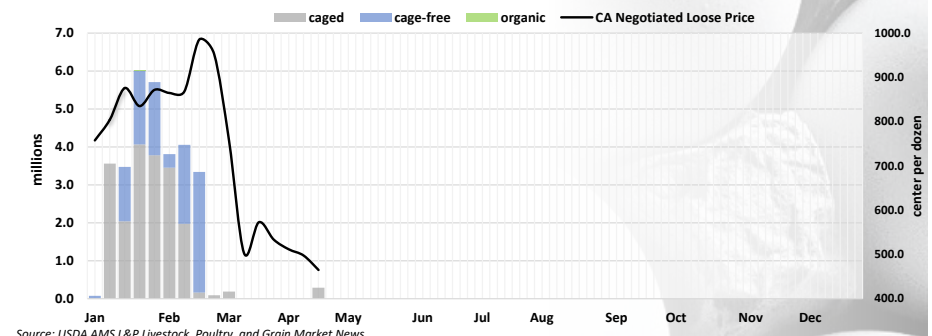
Source: USDA AMS Livestock & Poultry Program, Livestock, Poultry, and Grain Market News Division

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



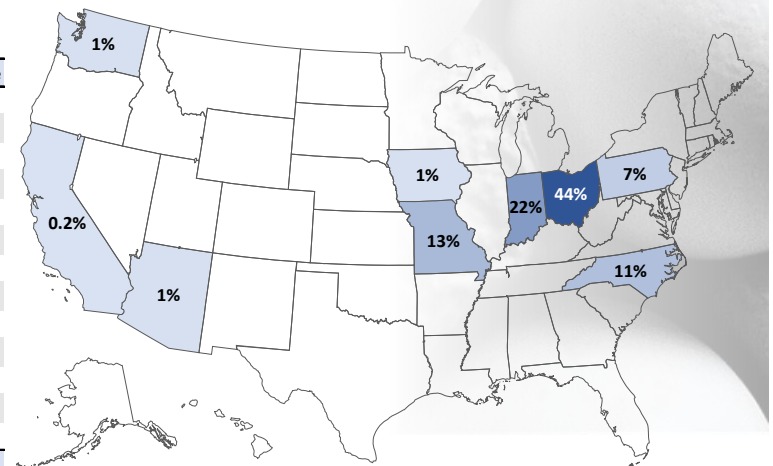
Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

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



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