



Egg Markets Overview

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

February 28, 2025

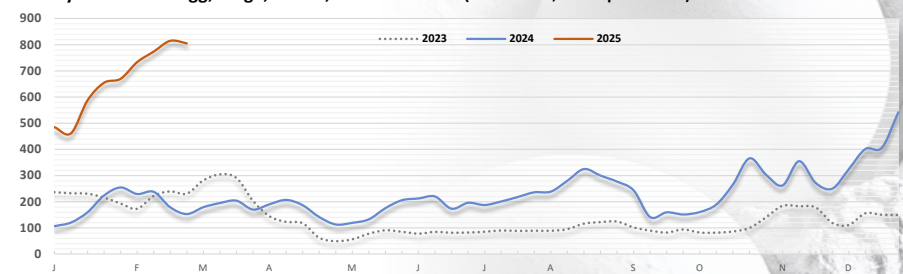
Negotiated wholesale prices for graded loose eggs steadied and began to show weakness as demand began to ease with retail interest in a full range and food service light to moderate. This has helped to slightly increase spot market offerings. Outbreaks of highly pathogenic avian influenza (HPAI) have slowed over the past week and have been localized which is providing producers in unaffected regions with an opportunity to make progress in reducing the egg deficit problem the market has been experiencing. Supplies are light to moderate and trading has slowed to a moderate pace. Prices for national trading of trucklot quantities of graded, loose, White Large shell eggs decreased \$0.10 to \$8.05 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 rose \$0.06 to \$8.53 per dozen with a steady undertone. In the major Midwest production region, wholesale prices for Large, white, shell eggs delivered to warehouses increased \$0.25 to \$8.30 per dozen with a firm undertone while prices paid to producers for Large cartoned shell eggs increased \$0.20 to \$8.12 per dozen. The California benchmark for Large shell eggs rose \$0.05 to \$9.22 per dozen with a firm undertone. Delivered prices on the California-compliant wholesale loose egg market declined \$0.33 to \$9.53 per dozen with a cautious steady undertone.

Demand for shell eggs declined over the past week with the approach of March following a similar pattern as last year which saw a similar sharp run-up in market prices. Marketers are still having to deal with inadequate supplies resulting from HPAI-related production impacts but the market is showing signs that the situation may be beginning to improve. While significant HPAI outbreaks continue to occur, the pace is slowing and most recent cases have been regionally isolated which is providing an opportunity for recovery efforts in other parts of the country to make progress. Grocers continue to use a variety of tools to stretch existing supplies including placing limits on units purchased, limiting or halting any sales promotions on shell eggs altogether, and stocking a wider range of shell egg sizes including Extra Large, Medium, and even Small class shell eggs to supplement Large offerings, the most popular consumer shell egg size Demand from egg products manufacturers improved this week as some are looking for spot market opportunities to supplement their reliance on owned production and stocks to run their breaking lines following an uptick in production last week.

Feature activity for conventional caged Large shell eggs is very limited with a few ads in the Northeast and South Central. The average ad price is down \$1.52 to \$2.47 per dozen. The pace of specialty shell egg featuring is very limited and scattered among various cage-free and organic offerings. Feature activity for [UEP-defined cage-free](#) shell eggs is down \$3.00 to \$4.99 per dozen on a more representative test. The price spread on feature between 12-packs of Large caged eggs and UEP cage-free eggs narrows considerably to \$1.48 per dozen. Grocers continue to avoid incentivizing shell egg movement as they work to maintain a consistent supply to their customers while they await improvement in the supply situation.

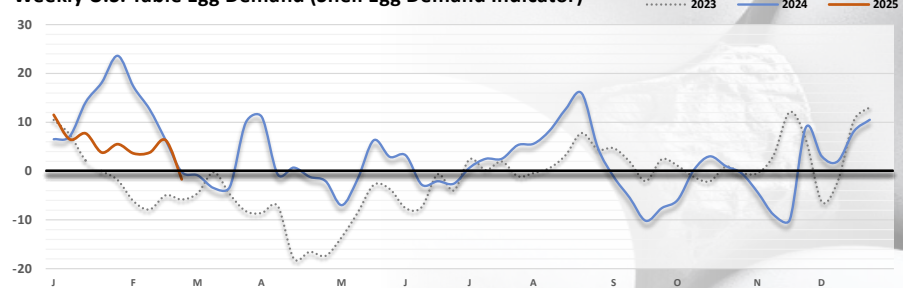
The overall shell egg inventory gained nearly 4% while the national inventory of Large

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	49	2.47	--	--
nutritionally-enhanced	--	--	--	--
Cage-Free - Non-Organic				
barn/aviary	--	--	153	4.99
free-range	--	--	--	--
pastured	--	--	15	7.99
USDA Organic				
organic	--	--	--	--
free-range	--	--	15	6.29
pastured	--	--	15	9.69

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

caged, conventional	20%
caged, ne	0%
CF, barn/aviary	62%
CF, free-range	0%
CF, pasture	6%
organic	0%
organic, free-range	6%
organic, pasture	6%

class shell eggs was up just over 2.5%. Stocks of Large shell eggs in the key Midwest region drew down 4% as product moved from production points into marketing channels to as supplies remain tight at retail outlets across the nation. The inventory share of Large class shell eggs was down slightly at just under a 50% share of all shell egg stocks on inventory at the start of the week. Not much change in stocks of specialty shell eggs with stocks of cage-free eggs down about 2.5% while stocks of nutritionally-enhanced eggs gained just over a half percent. Stocks of organic shell eggs were down a half percent. The breaking stock inventory gained nearly one percent as breakers are running reduced schedules while spot market offerings remain very limited. Total estimated table egg production is down slightly from last week and is down 6% from a year ago to a year-to-year deficit the equivalent of 8.5 million cases in total.

The average national wholesale price for breaking stock declined \$0.28 to \$6.05 per dozen with a weak undertone. Demand is in a full range for slightly more available offerings. Supplies are light to moderate and trading is moderate. Breaking schedules are full-time to reduced. The volume of eggs processed last week increased just over 1.5% and the share of weekly table egg production gained a half percent to 29%. Cage-free stock accounted for about 35.5% of eggs processed last week¹. Production of whole egg was down 3% as production shifted to egg components. Production of whites rose just over 9% while that for yolk was just over 12.5%. Dried egg production increased about 9% and production of inedible egg was up about 7%. Breaking yields without inedible were about unchanged at 42.22 pounds per case broken.

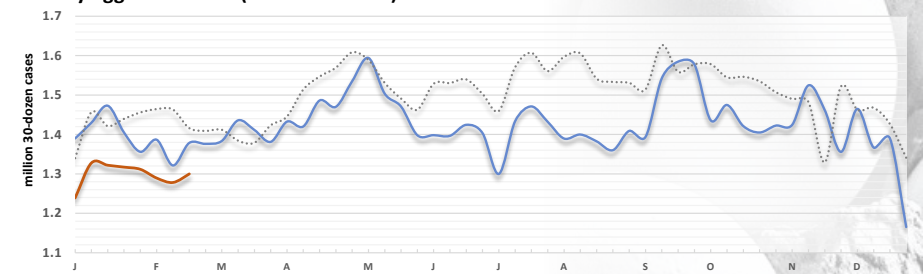
Wholesale prices for certified liquid whole eggs are higher with a firm to higher undertone. Demand is good for light to very light offerings. Trading is moderate to active. Wholesale prices on whole frozen eggs are \$0.34 higher at \$5.31 and frozen whites are \$0.20 at \$3.70 per pound. The undertone is steady 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 firm with good to very good demand. Offerings are very light and supplies are light to very light. Trading is 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.

As of February 1, 2025, the estimated U.S. non-organic commercial cage-free table egg flock stood at 102.2 million, 35% of the current U.S. table egg flock. This represents a 3% decline in the number of non-organic, cage-free table egg layers from February 2024 but an 0.8% increase in their share of the total U.S. table egg flock.

1/: Beginning 2/26/2025, information on the volume of cage-free eggs processed and their share of total eggs processed was added to the [Eggs Processed](#) report

Weekly Eggs Processed (30-dozen cases)



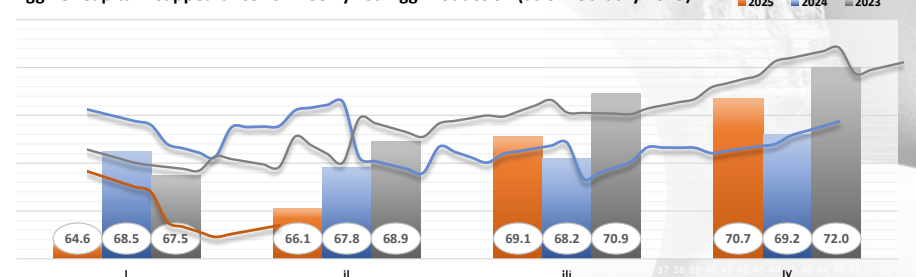
Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

Eggs Processed - Week-to-Week Change

total	share	case yield*	whole	whites	yolks	dried	inedible
1.7%	0.6%	0.05	-3.1%	9.3%	12.6%	8.9%	7.1%

* case yield w/ inedible in pounds per case.

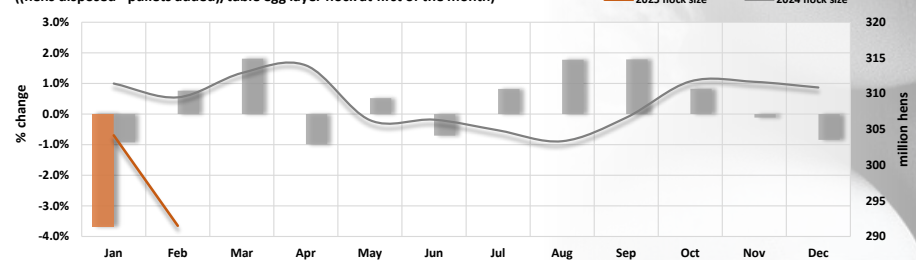
Egg Per Capita Disappearance vs. Weekly Est. Egg Production (as of February 2025)



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

Table Egg Layer Replacement - Net Flock Change

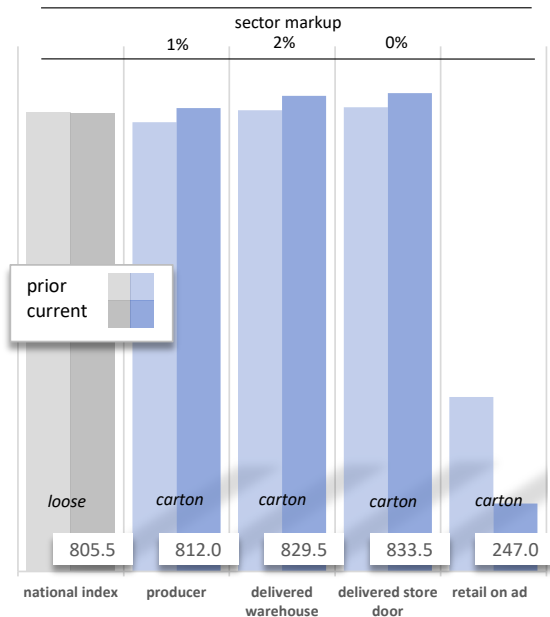
((hens disposed - pullets added)/table egg layer flock at first of the month)



Shell Eggs Market Price Comparisons

(as of February 28, 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						
	28-Feb	% Change	21-Feb	14-Feb	7-Feb	31-Jan	24-Jan
SHELL EGGS (Large, White, conventional in cents per dozen)							
National, loose (negotiated; f.o.b. dock prices)	805.48	-1%	815.22	774.06	733.82	670.00	655.00
California-compliant, loose, (negotiated delivered)	952.78	-3%	985.56	868.24	865.00	872.00	835.33
Midwest, cartoned (formula sales; dlvr'd to warehouse)	829.50	3%	804.50	776.50	742.50	703.00	649.00
New York, cartoned (formula sales; dlvd to store)	853.00	1%	847.00	823.00	795.00	763.00	724.00
California-compliant, cartoned, benchmark	1007.00	9%	922.00	917.00	911.00	897.00	897.00
National Retail Shell Egg (avg. ad price in dollars per dozen)							
Conventional Caged, Large, White	2.47	-38%	3.99	n/a	n/a	2.68	n/a
UEP Cage-Free, Large, Brown	4.99	-38%	7.99	n/a	n/a	n/a	2.50
EGG PRODUCTS (f.o.b. shipper dock prices)							
Breaking Stock (negotiated; dlvd prices cents per doz)	604.75	-4%	632.50	633.25	584.50	390.00	305.00
Whole Frozen Egg (dollars per pound)	5.31	7%	4.97	4.44	3.11	3.11	2.77
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	28.8%	0.6%	28.2%	28.4%	28.7%	28.2%	28.2%
SHELL EGG DEMAND INDICATOR (no units)	-1.7	-8.0	6.3	3.8	3.6	5.5	3.8

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)	28-Feb	Change	21-Feb	2025 High	2025 Low		
National, loose (negotiated; f.o.b. dock prices)	805.5	▼ -1%	815.2	815.2	21-Feb	461.7	10-Jan
California-compliant, loose, (negotiated delivered)	952.8	▼ -3%	985.6	996.2	26-Feb	800.0	21-Jan
Midwest, cartoned (formula sales; dlvr'd to warehouse)	829.5	▲ 3%	804.5	829.5	21-Feb	575.0	02-Jan
New York, cartoned (formula sales; dlvd to store)	853.0	▲ 1%	847.0	853.0	25-Feb	604.0	02-Jan
California-compliant, cartoned, benchmark	1007.0	▲ 9%	922.0	1007.0	21-Feb	897.0	02-Jan
Breaking Stock (negotiated; dlvd prices cents per doz)	604.8	▼ -4%	632.5	633.8	18-Feb	305.0	02-Jan
Whole Frozen Egg (dollars per pound)	5.31	▲ 7%	4.97	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	2.47	▼ -38%	3.99	3.99	21-Feb	1.87	03-Jan
Natl Average Retail Ad Price - UEP Cage-free ²	4.99	▼ -38%	7.99	7.99	21-Feb	2.50	17-Jan
Shell Egg Demand Indicator	-1.7	▼ -8.0	6.3	11.5	02-Jan	-1.7	26-Feb

¹ mostly high; ² non-organic

U.S. Table Egg Layer Flock Estimates

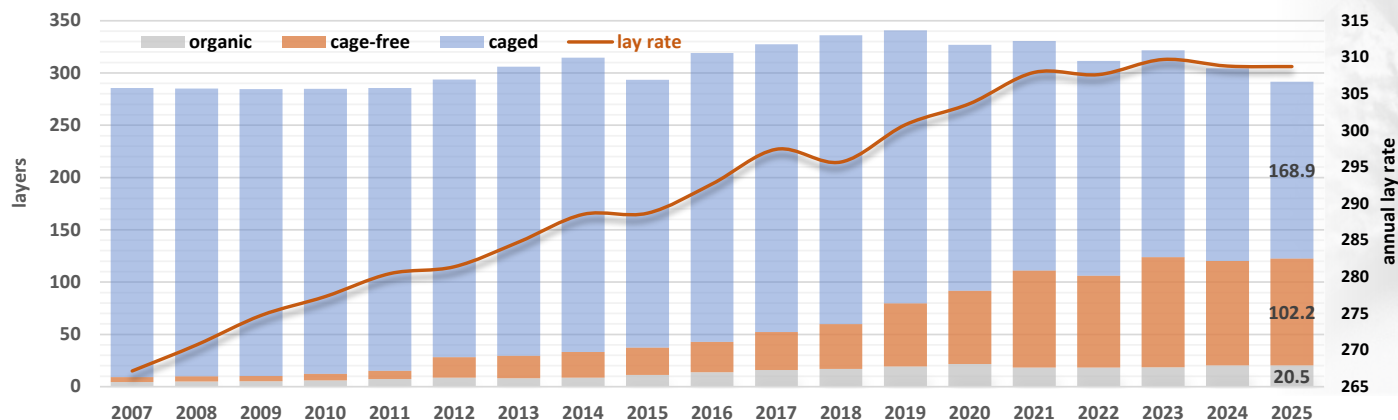
As of February 2025	2025	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012
Total U.S. Caged¹ Flock:	57.9%	59.2%	61.6%	65.9%	66.4%	72.0%	76.6%	82.2%	84.0%	86.6%	87.3%	89.5%	90.3%	90.4%
Layers (millions)	168.9	184.0	197.7	205.3	219.4	235.5	261.0	276.1	275.1	276.1	256.1	281.6	276.4	265.5
Total U.S. Cage-Free Flock:	42.1%	38.7%	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)	122.6	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:	35.0%	32.1%	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)	102.2	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	29.8%	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)	86.8	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:	7.0%	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)	20.5	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	4.3%	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	1.5%	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	1.1%	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 February 2025)



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

Egg Markets Overview

2025 Commercial Table Egg Flock HPAI Losses

Outbreaks of highly pathogenic avian influenza (HPAI) in commercial table egg layer flocks in the first two months of 2025 have resulted in the depopulation of 30.1 million birds. To date, USDA APHIS has confirmed 39 outbreaks in layer flocks in 9 states (AZ, CA, IA, IN, MO, NC, OH, PA, and WA). The 30.1 million birds lost included 22.2 million (74%) in conventional caged systems, 7.9 million (26%) in cage-free systems, and 26,000 organic (0.1%). These losses represent 12.2% of the conventional caged layer flock, 7.8% 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 February 1 was down 7.3% while the cage-free flock increased 1.2% and the organic flock 0.6%. As of the end of February, nearly three-fourths of layer losses have occurred in caged systems. To date, Ohio has borne the brunt of 2025 outbreaks with 13.3 million (44%) of losses occurring in Ohio flocks – 32% of the Ohio flock on hand during January.

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 in the retail cartoned sector.

2025 Table Egg Layer Losses by Production System

System	Loss	Share
Conventional Caged....	22,194,420	74%
Cage-Free.....	7,865,080	26%
Organic.....	26,100	0.1%
Total	30,085,600	

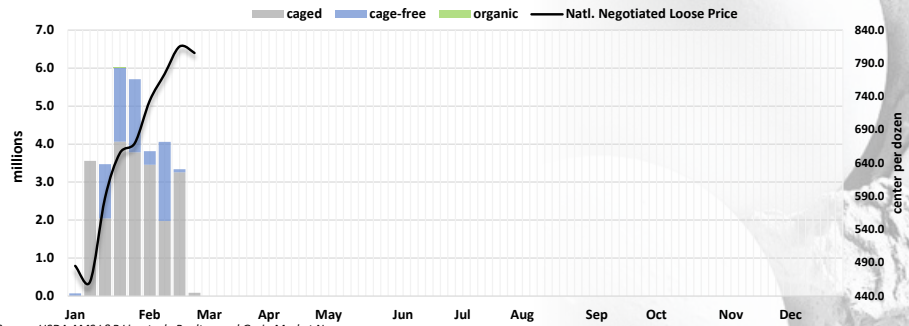
2025 Table Egg Layer Losses

(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
IA		241,600											241,600
IN	3,013,300	3,591,400											6,604,700
MO	3,910,300												3,910,300
NC	3,314,900												3,314,900
OH	7,845,300	5,408,800											13,254,100
PA		2,060,400											2,060,400
WA	307,800												307,800
													-
													-
													-
Total	18,783,400	11,302,200	-	-	-	-	-	-	-	-	-	-	30,085,600

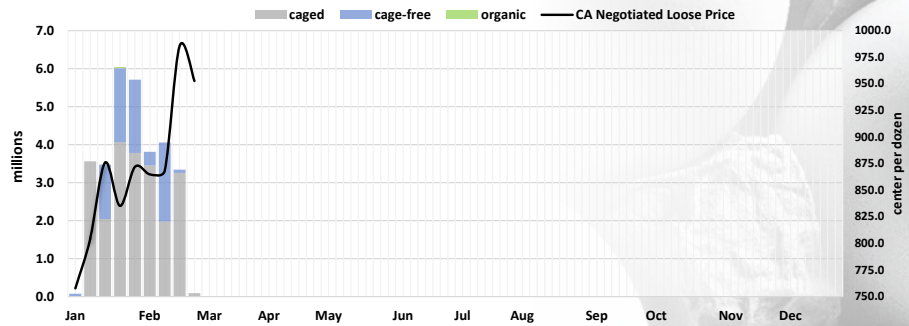
Source: USDA AMS Livestock & Poultry Program, Livestock, Poultry, and Grain Market News Division

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

