

USDA Egg Markets Overview

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

September 19, 2025

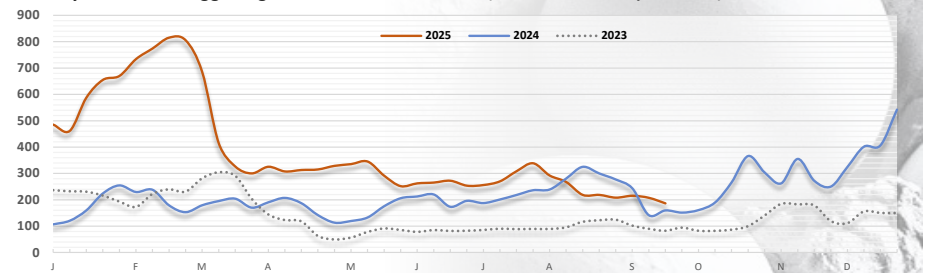
Negotiated wholesale prices for graded loose caged eggs are lower with light to moderate demand for moderate to available offerings. Supplies are mostly moderate to instances heavy. Trading is moderate. Wholesale prices for national trading of trucklot quantities of graded, loose, white Large shell eggs decreased \$0.21 to \$1.87 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 declined \$0.32 to \$2.29 per dozen with a weak undertone. In the major Midwest production region, wholesale prices for Large, white, shell eggs delivered to warehouses were unchanged at \$2.50 per dozen with a steady undertone while the price to producers for Large cartoned shell eggs held at \$2.32 per dozen. The California benchmark for Large shell eggs declined \$0.19 to \$2.87 per dozen with a weak undertone. Delivered prices on the California-compliant wholesale loose egg market declined \$0.33 to \$1.90 per dozen with a weak undertone. Demand is mixed for moderate to available offerings and moderate to fully adequate supplies. Trading is slow to moderate.

Shell egg demand was unchanged over the past week and exceeded the prior year's level for the first time since the opening weeks of 2025 during the onset of the record rise in prices due to supply shortages resulting from significant outbreaks of highly pathogenic avian influenza. Since the start of September, grocery retailers have been stepping up their promotional efforts to re-acquaint shoppers with shell eggs as an economical and versatile protein source and advertised prices have slowly returned to the level where they stood as the year opened. Demand from egg products manufacturers is very limited as most focused on working down the build-up of stocks from the brief Labor Day production disruption. Line speeds have returned to a more normal rate on sufficient supplies from spot market offerings and owned stocks. Imports continue to temper demand for domestic production even as in-shipments continue to slow from early-year peaks.

Overall feature activity rises slightly from last week but with a shift in focus to specialty shell eggs. Feature activity for conventional caged eggs declines sharply and the average ad price increases \$0.53 to \$2.63 per dozen. Featuring of [UEP-certified](#) cage-free shell eggs slows from last week's active pace but still accounts for 17% of all shell egg ads this week. The average ad price increases \$0.49 to \$3.34 per dozen. Nutritionally-enhanced featuring increases but the most significant promotions this week are for pastured shell eggs with 43% of all eggs on sale this week. Organic types round out grocer feature activity for the week.

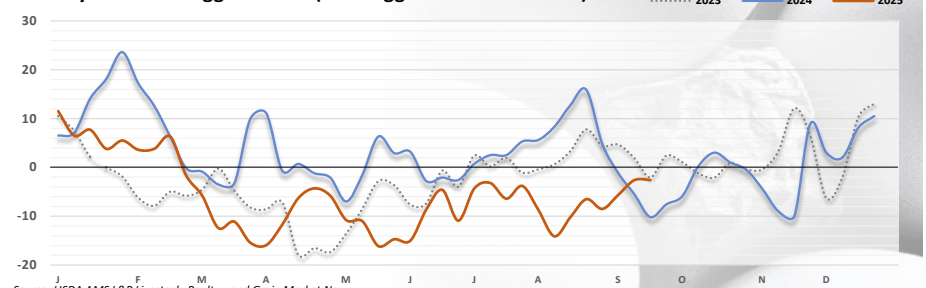
The overall shell egg inventory was down a little over one percent while the national inventory of Large class shell eggs was up just over 2%. Stocks of Large shell eggs in the Midwest production region were up a half percent as eggs continue to clear into marketing channels to replenish stocks drawn down by recent active retail promotional

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)

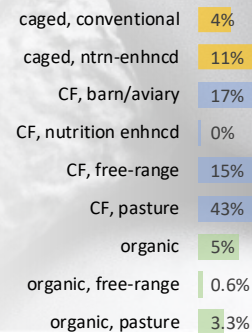


Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

This Week's Retail Large Shell Egg Feature Summary

Advertised Prices to Consumers at Major Retail Supermarkets

Caged	White-Shell		Brown-Shell	
	Activity	Price	Activity	Price
conventional	279	2.63	--	--
nutritionally-enhanced	744	3.50	--	--
Cage-Free - Non-Organic				
barn/aviary	999	3.32	69	3.60
nutritionally-enhanced	--	--	24	4.50
free-range	--	--	991	5.21
pastured	--	--	2,769	6.44
USDA Organic				
organic	--	--	348	4.59
free-range	--	--	37	9.99
pastured	--	--	211	5.17



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

activity. The inventory share of Large class shell eggs increased 1.5% to a 50% share of all shell egg stocks on inventory at the start of the week. Stocks of cage-free eggs were down 7.5% as these types have moved to support increased retail activity over the past two weeks. Stocks of nutritionally-enhanced eggs decline 4% and those for organic shell eggs declined just over 2%. The inventory of breaking stock declined 3.5% as processing schedules are running full-time with reduced spot market availability from which to draw. Total estimated table egg production is unchanged from last week and increased slightly from last year to a year-to-year deficit the equivalent of 4.6 million cases in total.

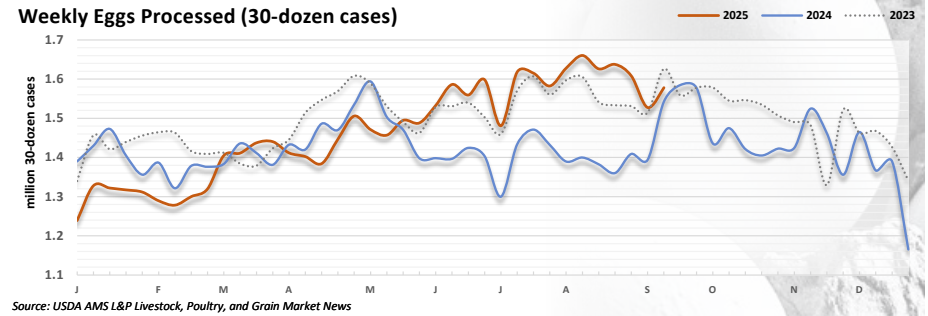
The average national wholesale price for breaking stock declined \$0.12 to \$1.26 per dozen with a weak undertone. Demand is light to very light for light to moderate offerings and moderate supplies. Processing schedules are full-time and trading is slow to moderate. The volume of eggs processed over the past week increased just over 3% coming out of the prior, holiday-shortened week and the share of weekly table egg production rose 1.5% to 34%. Cage-free stock accounted for 37% of eggs processed last week, down one percent in share. Production of whole egg gained one percent while production of whites was up 3.5% and for yolks up just over 9%. Dried egg production was up nearly 7% and the production of inedible eggs increased over 5.5%. Breaking yields without inedible declined slightly to 41.70 pounds per case broken.

Wholesale prices for certified liquid whole eggs are weak to lower on moderate demand for light to moderate offerings and supplies. Trading is moderate. Wholesale prices for whole frozen eggs decreased \$0.06 to \$1.68 per pound and prices for frozen whites were down \$0.06 to \$1.27 per pound. The undertone is weak with light to moderate demand and light to moderate offerings and supplies with slow to moderate trading. Prices for dried whole eggs declined \$0.40 to \$12.42 per pound and prices for dried yolk were down \$0.36 to \$12.89 per pound. Dried albumen remains untested. The undertone is weak with moderate to good demand for light to moderate offerings. Supplies are very light to moderate and trading is mostly moderate.

According to NASS, the June monthly volume of frozen eggs in storage increased 7% from May but 48% below the prior year. Stocks of whole frozen egg increased 8%, 44% below last year and the share of whole egg stocks was unchanged at 44% of total frozen stocks. Stocks of frozen yolk increased 16% and were 40% below the level from last year. Frozen egg whites gained 8% to a level 55% below last year. Stocks of unclassified eggs rose 6% from last month and were down 51% from last year. The share of unclassified frozen stocks declined one percent to a 45% share of total frozen stocks.

As of August 1, 2025, the estimated U.S. non-organic commercial cage-free table egg flock increased 2% to 116.3 million, 39.2% of the current U.S. table egg flock. This represents a 12% increase over the number of non-organic, cage-free table egg layers on August 1, 2024, and a 5% increase in the share of the total commercial table egg flock. The USDA certified organic table egg layer flock on August 1 was down slightly from July at 6.7% of the total layer flock. The ratio of caged to cage-free layers currently stands at 54/46 as compared to 53.5/46.5 last month and 59/41 last year.

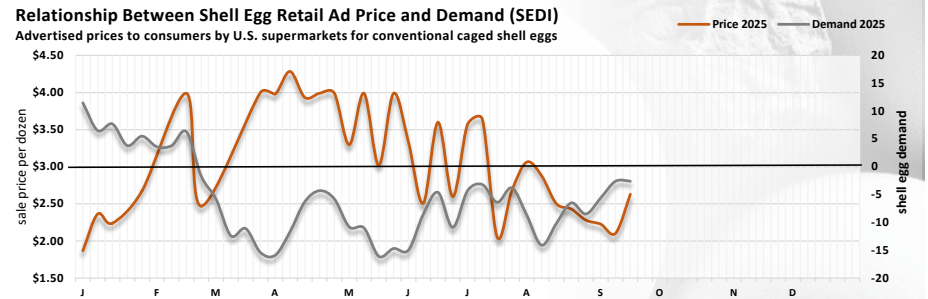
Source: USDA AMS Livestock & Poultry Program, Livestock, Poultry, and Grain Market News Division



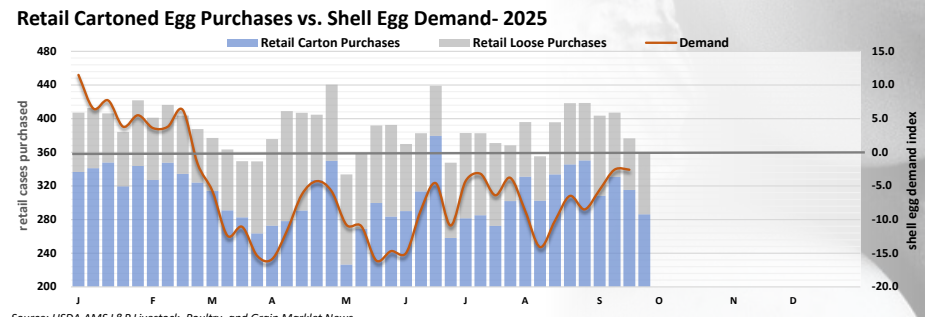
Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

Eggs Processed - Week-to-Week Change							
total	share	case yield*	whole	whites	yolks	dried	inedible
3.3%	1.1%	-0.19	1.1%	3.5%	9.3%	6.8%	5.7%

* case yield w/ inedible in pounds per case.



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

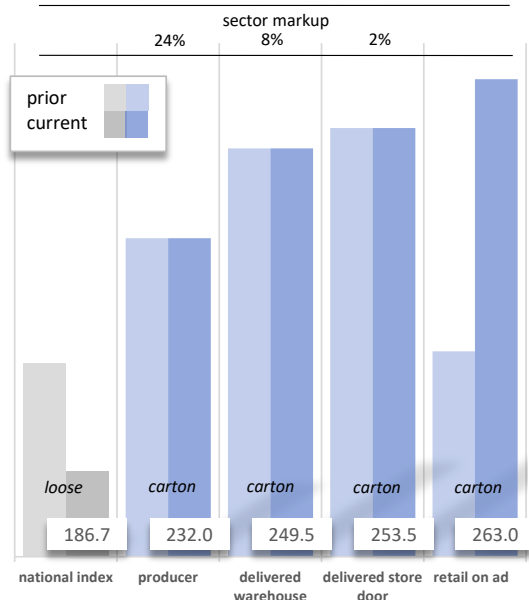


Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

Shell Eggs Market Price Comparisons

(as of September 19, 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						
	19-Sep	% Change	12-Sep	5-Sep	29-Aug	22-Aug	15-Aug
SHELL EGGS (Large, White, conventional in cents per dozen)							
National, loose (negotiated; f.o.b. dock prices)	186.70	-10%	207.74	215.53	208.37	218.84	218.79
California-compliant, loose, (negotiated delivered)	190.00	-15%	222.92	265.25	230.00	230.00	237.91
Midwest, cartoned (formula sales; dlvr'd to warehouse)	249.50	0%	249.50	249.50	249.50	252.50	277.50
New York, cartoned (formula sales; dlvd to store)	229.00	-12%	261.00	261.00	261.00	261.00	264.00
California-compliant, cartoned, benchmark	287.00	-6%	306.00	309.00	309.00	309.00	343.00
National Retail Shell Egg (avg. ad price in dollars per dozen)							
Conventional Caged, Large, White	2.63	25%	2.10	2.23	2.28	2.43	2.50
UEP Cage-Free, Large, Brown	3.34	17%	2.85	3.20	2.93	3.04	3.20
EGG PRODUCTS (f.o.b. shipper dock prices)							
Breaking Stock (negotiated; dlvd prices cents per doz)	126.25	-9%	138.50	139.75	139.75	139.75	140.00
Whole Frozen Egg (dollars per pound)	1.68	-3%	1.74	1.35	n/a	n/a	n/a
Whole Dried Eggs (dollars per pound)	12.42	-3%	12.82	12.57	n/a	n/a	16.00
Processed Share of Weekly Shell Egg Production	33.8%	1.1%	32.7%	34.5%	35.2%	35.0%	35.8%
SHELL EGG DEMAND INDICATOR (no units)							
	-2.6	0.0	-2.6	-5.6	-8.5	-6.5	-10.2

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)	19-Sep	Change	12-Sep	2025 High	2025 Low
National, loose (negotiated; f.o.b. dock prices)	186.7	▼ -10%	207.7	816.8	03-Mar
California-compliant, loose, (negotiated delivered)	190.0	▼ -15%	222.9	996.2	26-Feb
Midwest, cartoned (formula sales; dlvr'd to warehouse)	249.5	▬ 0%	249.5	841.5	28-Feb
New York, cartoned (formula sales; dlvd to store)	229.0	▼ -12%	261.0	853.0	25-Feb
California-compliant, cartoned, benchmark	287.0	▼ -6%	306.0	1035.0	28-Feb
Breaking Stock (negotiated; dlvd prices cents per doz)	126.3	▼ -9%	138.5	633.8	18-Feb
Whole Frozen Egg (dollars per pound)	1.68	▼ -3%	1.74	5.31	28-Feb
Whole Dried Eggs (dollars per pound)	12.42	▼ -3%	12.82	25.00	16-May
Natl Average Retail Ad Price - Conventional caged	2.63	▲ 25%	2.10	4.28	11-Apr
Natl Average Retail Ad Price - UEP Cage-free ²	3.34	▲ 17%	2.85	7.99	21-Feb
Shell Egg Demand Indicator	-2.6	▬ 0.0	-2.6	11.5	02-Jan

¹ mostly high; ² non-organic

2025 Commercial Table Egg Flock HPAI Losses as of September 19, 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 August 1 was down 12% while the cage-free flock was up 15% and the organic table egg flock was down 1.6%.

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	

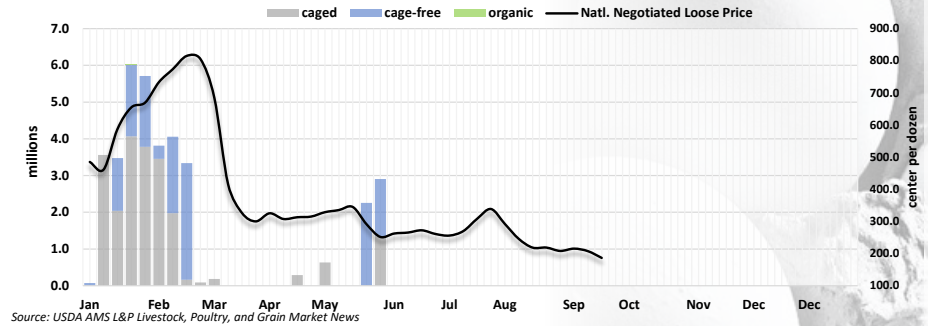
2025 Table Egg Layer Losses

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

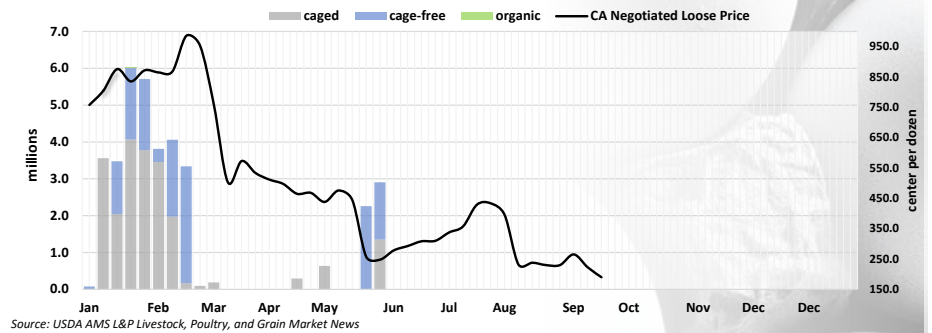
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Totals	Share
AZ	316,600				5,164,300								5,480,900	15%
CA	75,200												75,200	0%
IA		241,600											241,600	1%
IN	2,987,200	3,591,400	187,200										6,765,800	19%
MO	3,910,300												3,910,300	11%
NC	3,314,900												3,314,900	9%
OH	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

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



Share by State of Total 2025 Commercial Table Egg Layer Losses

