

USDA Egg Markets Overview

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

August 01, 2025

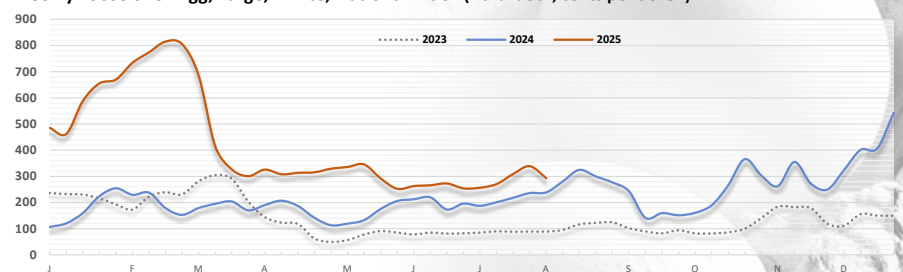
Negotiated wholesale prices for graded loose caged eggs moved lower through the week as demand declined and supplies became fully adequate. Offerings remain light to moderate on slow to moderate trading. Wholesale prices for national trading of trucklot quantities of graded, loose, White Large shell eggs decreased \$0.46 to \$2.92 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 \$0.21 to \$3.49 per dozen with a weak undertone. In the major Midwest production region, wholesale prices for Large, white, shell eggs delivered to warehouses increased \$0.19 to \$3.59 per dozen with a steady undertone while the price to producers for Large cartoned shell eggs increased to \$3.41 per dozen. The California benchmark for Large shell eggs rose \$0.06 to \$4.76 per dozen with a steady undertone. Delivered prices on the California-compliant wholesale loose egg market decreased \$0.38 to \$3.96 per dozen with a weak undertone. Demand is light to moderate for light to moderate offerings and moderate to adequate supplies. Trading is slow to moderate.

Shell egg demand weakened over the over the past week as the pace of retail promotions slowed from its recent active pace and attractive ad pricing expired. As marketers worked to restock, they found the availability of heavier-weight shell eggs, particularly the consumer staple Large class, was reduced due an increased percentage of hens not yet in mature production as a result of scheduled flock replacements and wholesale price levels moved higher. As a result, once needs were covered, buyers stepped out of the market and grocers curtailed their feature activity as both awaited a downward adjustment in the market which has come this week. Demand from egg products manufacturers is light even as slowing carton demand has increased spot market offerings. Many are content to work from owned production, imports, and stocks-on-hand and are taking a wait-and-see position as they await further, more favorable price developments. With the arrival of August, the distant sound of back-to-school bells is signaling the seasonal rise in shell egg demand as the new school year approaches.

Overall feature activity increases over the past week with a focus on nutritionally-enhanced and free-range shell eggs. Ads for conventional caged eggs remain limited and the average ad price increased \$0.38 to \$3.06 per dozen. Featuring of [UEP-certified](#) cage-free shell eggs increases but only accounts for 9% of all shell egg ads this week and the average ad price decreases \$0.36 to \$3.35 per dozen. Features for both brown and white-shelled nutritionally-enhanced shell eggs figure prominently in ads this cycle but it is free-range types that dominate with a 32% share of weekly promotions. Pastured shell eggs, both non-organic and organic, enjoy some ad space as do pastured types.

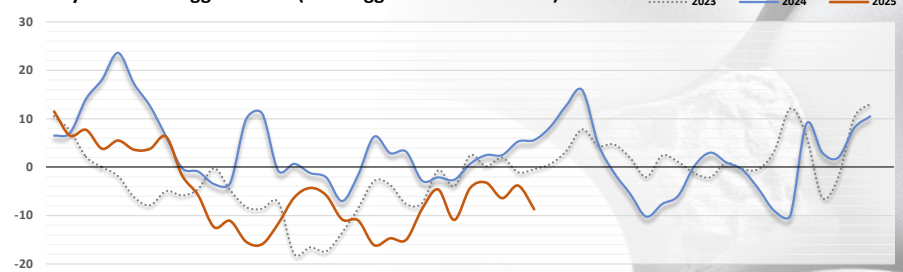
The overall shell egg inventory gained 8% while the national inventory of Large class shell eggs rose 11%. Stocks of Large shell eggs in the key Midwest production region increased 19% as carton business slowed following several active weeks of retail feature campaigns

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)

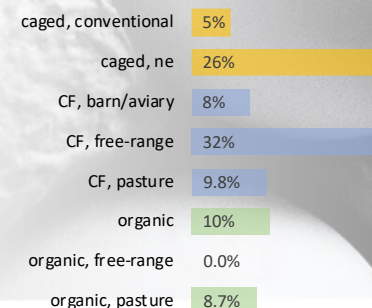


Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

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	206	3.06	--	--
nutritionally-enhanced	642	2.99	410	5.75
Cage-Free - Non-Organic				
barn/aviary	84	3.84	223	3.17
free-range	--	--	1,303	5.72
pastured	--	--	396	7.47
USDA Organic				
organic	--	--	410	4.35
free-range	--	--	--	--
pastured	--	--	349	7.95



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

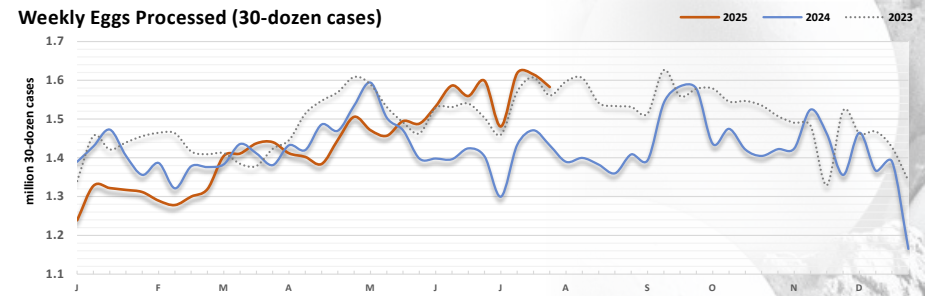
followed by active restocking efforts now largely complete. The inventory share of Large class shell eggs rose nearly 2% to a 49% share of all shell egg stocks on inventory at the start of the week. Stocks of cage-free eggs were up 12% as retail movement slows following recent active promotions. Stocks of nutritionally-enhanced eggs declined about 1.5% as product moved into channels to support retail promotions. Similarly, stocks of organic shell eggs were down nearly 6%. The inventory of breaking stock declined 2% as breakers kept production levels elevated and as imports slowed. Total estimated table egg production was unchanged from last week and was down slightly from last year to a year-to-year deficit the equivalent of 9.7 million cases in total.

The average national wholesale price for breaking stock was down \$0.09 to \$1.81 per dozen with a steady undertone. Demand is 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 last week was down 2% and the share of weekly table egg production was unchanged at 35%. Cage-free stock accounted for 38% of eggs processed last week, a 3% percent increase in share. Production of whole egg was up just over 1.5% while production of egg components decreased – whites by 8% and yolks by 5%. Dried egg production decreased nearly 5.5% and the production of inedible egg declined 3%. Breaking yields without inedible improved slightly to 41.54 pounds per case broken.

Wholesale prices for certified liquid whole eggs are slightly lower on a thin test. Demand is moderate to good for light offerings and light to moderate supplies. Trading is moderate. Wholesale prices for whole frozen eggs are down \$0.10 to \$2.00 per pound with a weak undertone and prices for frozen yolk are untested with the last quote at \$1.65 per pound. The undertone is weak with light demand and offerings. Supplies are light to moderate with slow trading. Prices for dried whole eggs are down \$1.00 to \$17.00 per pound and those for dried yolk are down \$1.00 to \$17.00 per pound. Dried albumen remains untested. The undertone is steady with moderate to good demand for light offerings. Supplies are light to very light and trading is 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.

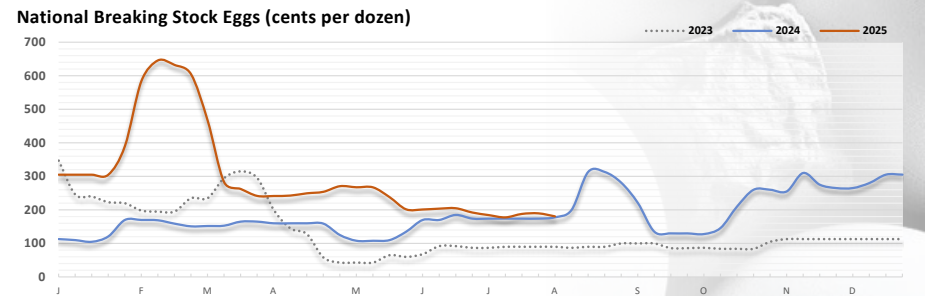
As of July 1, 2025, the estimated U.S. non-organic commercial cage-free table egg flock increased 3% to 113.8 million, 39.5% of the current U.S. table egg flock. This represents a 13% increase over the number of non-organic, cage-free table egg layers on July 1, 2024, and a 6.4% increase in the share of the total commercial table egg flock. The USDA certified organic table egg layer flock on July 1 was up one percent from June at 6.9% of the total layer flock. The ratio of caged to cage-free layers currently stands at 53.5/46.5 as compared to 54/46 last month and 60.5/39.5 last year.



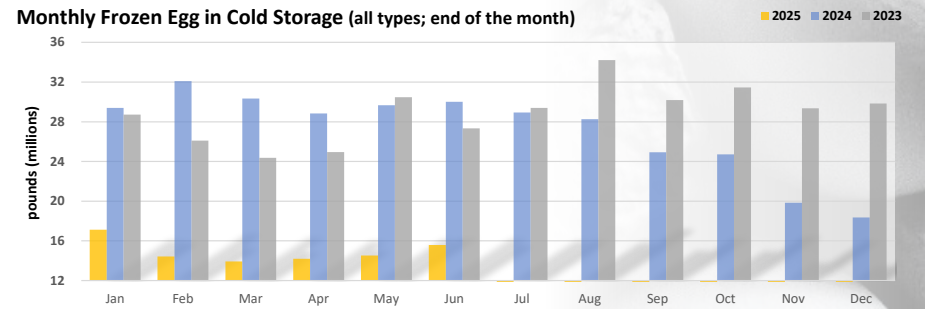
Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

Eggs Processed - Week-to-Week Change							
total	share	case yield*	whole	whites	yolks	dried	inedible
-2.0%	-0.8%	0.16	1.7%	-7.9%	-5.0%	-5.4%	-3.0%

* case yield w/ inedible in pounds per case.



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

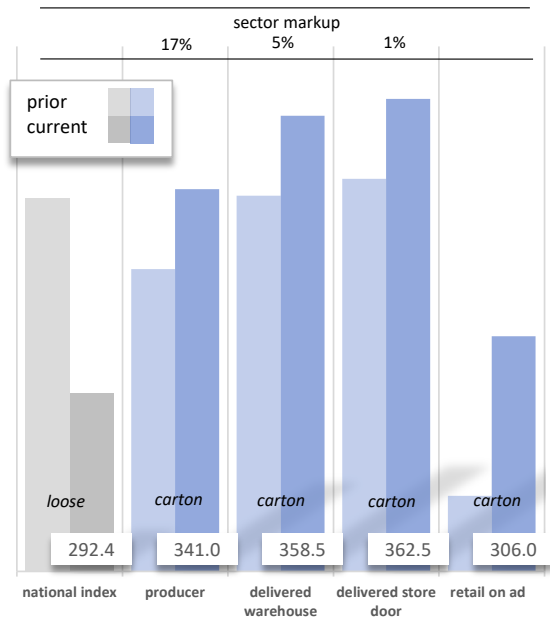


Source: USDA AMS L&P Livestock, Poultry, and Grain Market News; NASS

Shell Eggs Market Price Comparisons

(as of August 01, 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						
	1-Aug	% Change	25-Jul	18-Jul	11-Jul	4-Jul	27-Jun
SHELL EGGS (Large, White, conventional in cents per dozen)							
National, loose (negotiated; f.o.b. dock prices)	292.42	-14%	338.82	308.61	270.26	256.24	253.80
California-compliant, loose, (negotiated delivered)	395.71	-9%	433.55	429.05	360.31	337.89	322.95
Midwest, cartoned (formula sales; dlvr'd to warehouse)	358.50	6%	339.50	305.50	293.50	293.50	295.50
New York, cartoned (formula sales; dlvd to store)	349.00	-6%	370.00	358.00	323.00	305.00	305.00
California-compliant, cartoned, benchmark	476.00	1%	470.00	418.00	384.00	375.00	355.00
National Retail Shell Egg (avg. ad price in dollars per dozen)							
Conventional Caged, Large, White	3.06	14%	2.68	2.05	3.64	3.57	2.60
UEP Cage-Free, Large, Brown	3.35	-10%	3.71	3.19	3.25	3.19	3.07
EGG PRODUCTS (f.o.b. shipper dock prices)							
Breaking Stock (negotiated; dlvd prices cents per doz)	180.75	-5%	189.75	188.00	177.75	184.50	192.25
Whole Frozen Egg (dollars per pound)	2.00	-5%	2.10	n/a	n/a	2.30	2.40
Whole Dried Eggs (dollars per pound)	17.00	-6%	18.00	n/a	n/a	n/a	n/a
Processed Share of Weekly Shell Egg Production	35.0%	-0.8%	35.8%	35.9%	32.9%	35.5%	35.0%
SHELL EGG DEMAND INDICATOR (no units)	-8.7	-4.9	-3.8	-6.4	-3.2	-4.3	-10.9

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)	1-Aug	Change	25-Jul	2025 High		2025 Low	
National, loose (negotiated; f.o.b. dock prices)	292.4	▼ -14%	338.8	816.8	03-Mar	251.7	29-May
California-compliant, loose, (negotiated delivered)	395.7	▼ -9%	433.6	996.2	26-Feb	242.9	29-May
Midwest, cartoned (formula sales; dlvr'd to warehouse)	358.5	▲ 6%	339.5	841.5	28-Feb	288.5	30-May
New York, cartoned (formula sales; dlvd to store)	349.0	▼ -6%	370.0	853.0	25-Feb	300.0	29-May
California-compliant, cartoned, benchmark	476.0	▲ 1%	470.0	1035.0	28-Feb	345.0	05-Jun
Breaking Stock (negotiated; dlvd prices cents per doz)	180.8	▼ -5%	189.8	633.8	18-Feb	177.8	10-Jul
Whole Frozen Egg (dollars per pound)	2.00	▼ -5%	2.10	5.31	28-Feb	2.00	01-Aug
Whole Dried Eggs (dollars per pound)	17.00	▼ -6%	18.00	25.00	16-May	17.00	01-Aug
Natl Average Retail Ad Price - Conventional caged	3.06	▲ 14%	2.68	4.28	11-Apr	1.87	03-Jan
Natl Average Retail Ad Price - UEP Cage-free ²	3.35	▼ -10%	3.71	7.99	21-Feb	2.50	17-Jan
Shell Egg Demand Indicator	-8.7	▼ -4.9	-3.8	11.5	02-Jan	-16.1	21-May

¹ mostly high; ² non-organic

2025 Commercial Table Egg Flock HPAI Losses as of August 01, 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 July 1 was down 15.3% while the cage-free flock was up 12.7% 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	

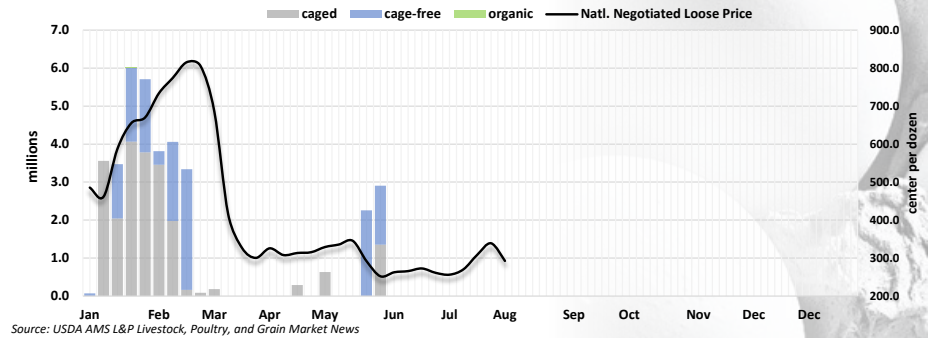
2025 Table Egg Layer Losses

(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	

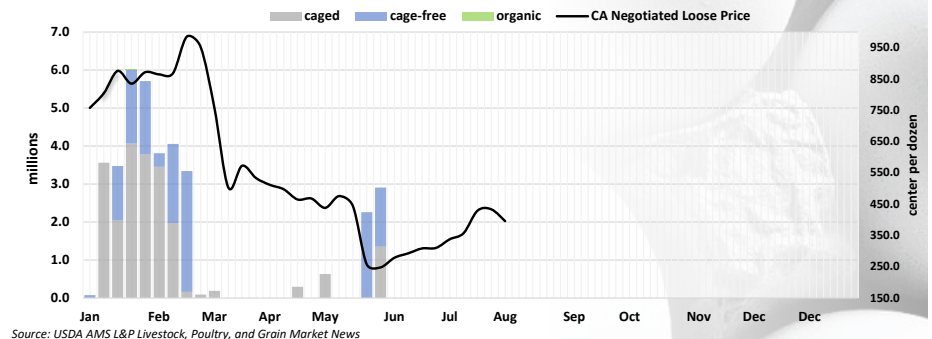
Source: USDA AMS Livestock & Poultry Program, Livestock, Poultry, and Grain Market News Division

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



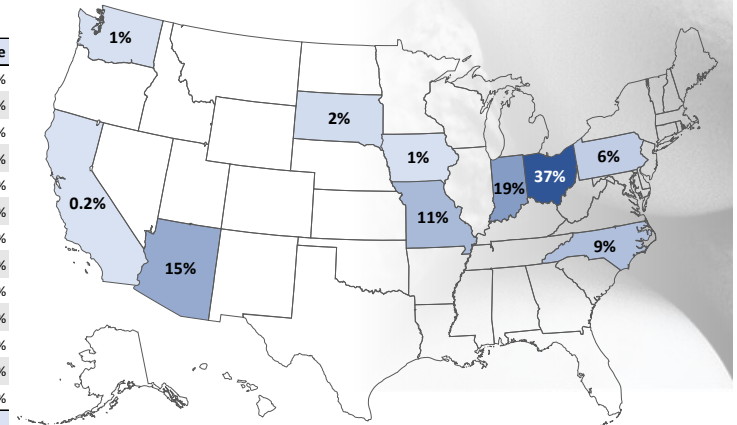
Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

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



Egg Markets Overview