

USDA Egg Markets Overview

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

September 26, 2025

Negotiated wholesale prices for graded loose caged eggs moved sharply lower with light to moderate demand for moderate to available offerings. Supplies are mostly moderate to instances heavy. Trading is slow to moderate. Wholesale prices for national trading of trucklot quantities of graded, loose, white Large shell eggs decreased \$0.54 to \$1.33 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 \$0.63 to \$1.66 per dozen with a weak undertone. In the major Midwest production region, wholesale prices for Large, white, shell eggs delivered to warehouses declined \$0.17 to \$2.33 per dozen with a weak undertone while the price to producers for Large cartoned shell eggs declined to \$2.15 per dozen. The California benchmark for Large shell eggs declined \$0.17 to \$2.70 per dozen with a weak undertone. Delivered prices on the California-compliant wholesale loose egg market declined \$0.69 to \$1.21 per dozen with a lower undertone. Demand is mostly light for moderate to available offerings and moderate to fully adequate supplies. Trading is slow to moderate.

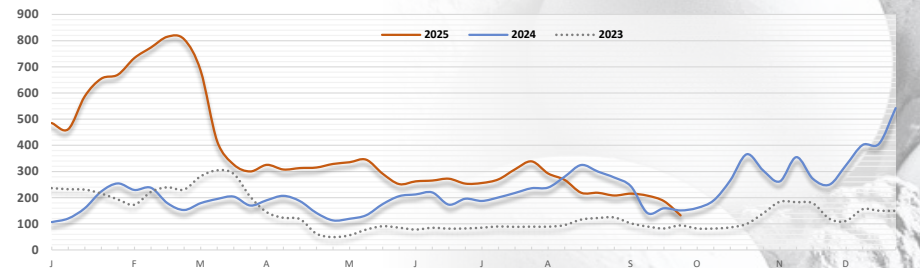
The pace of shell egg demand slowed into the end of the month but remains above the level of a year ago. Since the start of September, grocery retailers have been stepping up their promotional efforts but this activity has slowed and attractive average ad prices that have been driving consumer interest have risen to their highest point of the month and the highest since the start of August. This has had a dampening effect on demand as the market is poised to enter October, a month that typically sees increasing interest for shell eggs as November nears. Demand from egg products manufacturers remains very limited with most finding sufficient resources to run their processing lines at normal rates as carton business has slowed and spot market offerings have increased. Imports continue to cushion breakers from dependence on the spot market, placing them in a good position headed into the fall demand season for carton stock.

Overall feature activity is down slightly from last week and the focus remains on specialty shell eggs. Feature activity for conventional caged eggs doubles from last cycle and the average ad price increases \$0.24 to \$2.87 per dozen. Featuring of [UEP-certified](#) cage-free shell eggs dominates all types in ads this week and accounts for 43% of all shell egg ads. The average ad price declines \$0.61 to \$2.73 per dozen making cage-free shell eggs less expensive on ad than their conventional caged counterparts. Nutritionally-enhanced featuring increases into this cycle and organic shell eggs enjoy these most active level of featuring of the year to date.

The overall shell egg inventory increased 2% while the national inventory of Large class shell eggs gained 6%. Stocks of Large shell eggs in the Midwest production region were up nearly 4% as recent active retail movement slowed. The inventory share of Large class shell eggs increased 2% to a 52% share of all shell egg stocks on inventory at the start of the week, its highest share since May. Stocks of cage-free eggs were down 3% as these types cleared on active grocery promotional activity as did stocks of nutritionally-

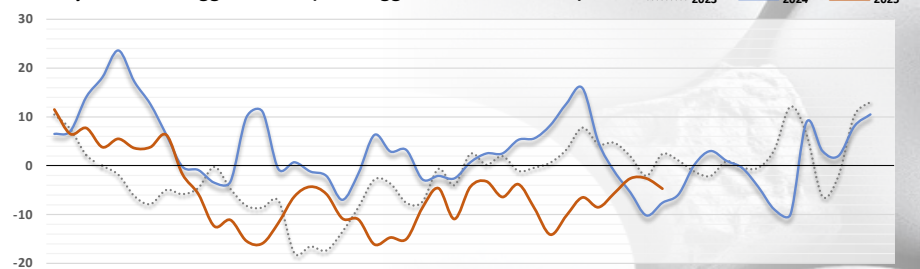
Source: USDA AMS Livestock & Poultry Program, Livestock, Poultry, and Grain Market News Division

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)



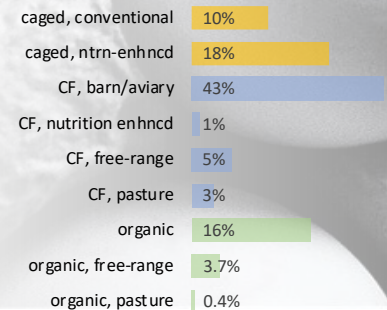
Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

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	598	2.87	--	--
nutritionally-enhanced	1,072	3.33	--	--
Cage-Free - Non-Organic				
barn/aviary	1,932	2.64	633	3.00
nutritionally-enhanced	--	--	62	4.49
free-range	--	--	319	5.25
pastured	--	--	177	7.33
USDA Organic				
organic	--	--	927	5.84
free-range	--	--	223	4.72
pastured	--	--	25	7.99

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



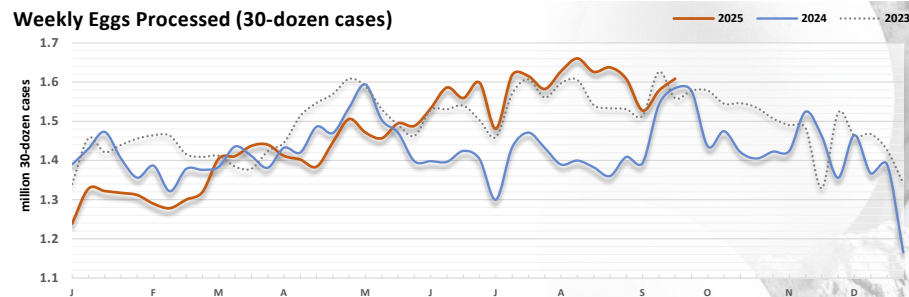
enhanced eggs, down 4%. Stocks of organic shell eggs were up just over one percent to support retail features breaking this week. The inventory of breaking stock rose 11.5% as slowing carton business increased spot market offerings at falling price levels while processing schedules ran at a moderate rate. 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 3.9 million cases in total, its closet point to year ago production since August 2024..

The average national wholesale price for breaking stock declined \$0.23 to \$1.04 per dozen with a weak undertone. Demand remains light to very light for moderate to available offerings and moderate to heavy supplies. Processing schedules are full-time to instances extended and trading is slow to moderate. The volume of eggs processed over the past week increased 2% and the share of weekly table egg production was about unchanged at 34%. Cage-free stock accounted for 39% of eggs processed last week, up one percent in share. Production of whole egg gained 5% while production of whites declined one percent and yolk production was down 5%. Dried egg production was down 13.5% while the production of inedible eggs was unchanged. Breaking yields without inedible improved slightly to 41.76 pounds per case broken.

Wholesale prices for certified liquid whole eggs are too few to publish with a weak undertone on moderate to good demand for light to moderate offerings and moderate supplies. Trading is moderate. Wholesale prices for frozen eggs are too few to publish with a weak undertone. Frozen whole eggs were last quoted at \$1.68 per pound and prices for frozen whites at \$1.27 per pound. Demand is light to moderate on light to moderate offerings and supplies with slow to moderate trading. Dried egg prices are too few to publish with dried whole eggs last quoted at \$12.42 per pound and dried yolk at \$12.89 per pound. Dried albumen remains untested. The undertone is steady 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.

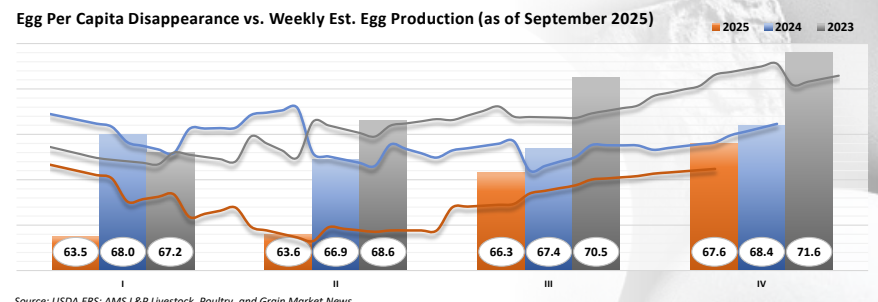
As of September 1, 2025, the estimated U.S. non-organic commercial cage-free table egg flock increased slightly to 116.6 million, 38.7% of the current U.S. table egg flock. This represents a 9% increase over the number of non-organic, cage-free table egg layers on September 1, 2024, and a 3.8% increase in the share of the total commercial table egg flock. The USDA certified organic table egg layer flock on September 1 was down slightly from August at 6.6% of the total layer flock. The ratio of caged to cage-free layers currently stands at 55/45 as compared to 54/46 last month and 58/42 last year.



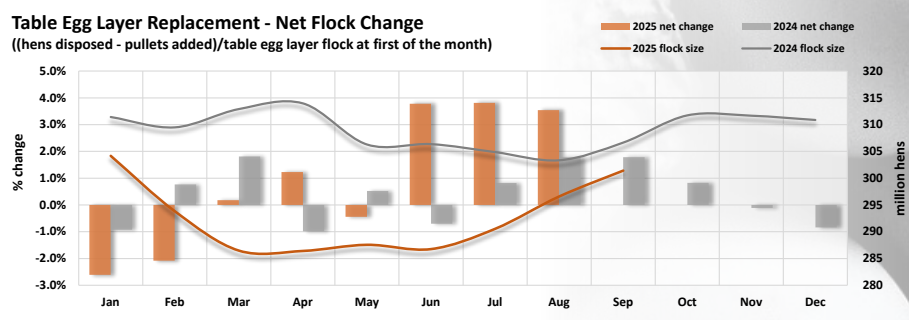
Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

Eggs Processed - Week-to-Week Change							
total	share	case yield*	whole	whites	yolks	dried	inedible
1.9%	0.6%	0.06	5.0%	-1.1%	-5.2%	-13.5%	0.0%

* case yield w/ inedible in pounds per case.



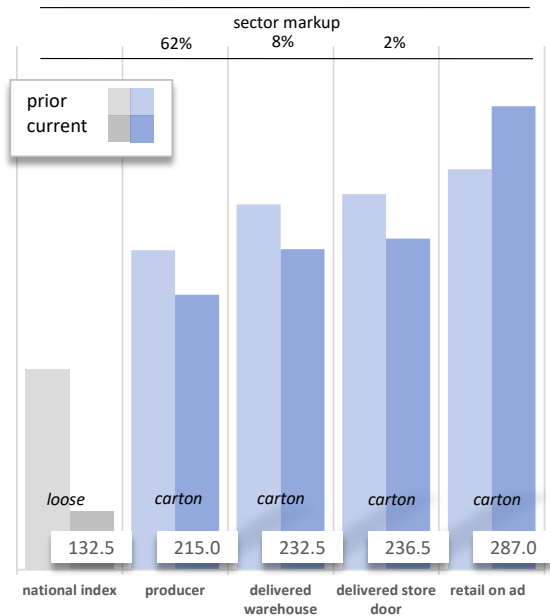
Source: USDA ERS; AMS L&P Livestock, Poultry, and Grain Market News



Shell Eggs Market Price Comparisons

(as of September 26, 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						
	26-Sep	% Change	19-Sep	12-Sep	5-Sep	29-Aug	22-Aug
SHELL EGGS (Large, White, conventional in cents per dozen)							
National, loose (negotiated; f.o.b. dock prices)	132.50	-29%	186.70	207.74	215.53	208.37	218.84
California-compliant, loose, (negotiated delivered)	120.67	-36%	190.00	222.92	265.25	230.00	230.00
Midwest, cartoned (formula sales; dlvr'd to warehouse)	232.50	-7%	249.50	249.50	249.50	249.50	252.50
New York, cartoned (formula sales; dlvd to store)	166.00	-28%	229.00	261.00	261.00	261.00	261.00
California-compliant, cartoned, benchmark	270.00	-6%	287.00	306.00	309.00	309.00	309.00
National Retail Shell Egg (avg. ad price in dollars per dozen)							
Conventional Caged, Large, White	2.87	9%	2.63	2.10	2.23	2.28	2.43
UEP Cage-Free, Large, Brown	2.73	-18%	3.34	2.85	3.20	2.93	3.04
EGG PRODUCTS (f.o.b. shipper dock prices)							
Breaking Stock (negotiated; dlvd prices cents per doz)	103.50	-18%	126.25	138.50	139.75	139.75	139.75
Whole Frozen Egg (dollars per pound)	1.68	0%	1.68	1.74	1.35	n/a	n/a
Whole Dried Eggs (dollars per pound)	12.42	0%	12.42	12.82	12.57	n/a	n/a
Processed Share of Weekly Shell Egg Production	34.3%	0.6%	33.7%	32.6%	34.4%	35.2%	35.0%
SHELL EGG DEMAND INDICATOR (no units)	-4.7	-2.1	-2.6	-2.6	-5.6	-8.5	-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)	26-Sep	Change	19-Sep	2025 High	2025 Low
National, loose (negotiated; f.o.b. dock prices)	132.5	▼ -29%	186.7	816.8 03-Mar	132.5 26-Sep
California-compliant, loose, (negotiated delivered)	120.7	▼ -36%	190.0	996.2 26-Feb	119.5 25-Sep
Midwest, cartoned (formula sales; dlvr'd to warehouse)	232.5	▼ -7%	249.5	841.5 28-Feb	232.5 18-Sep
New York, cartoned (formula sales; dlvd to store)	166.0	▼ -28%	229.0	853.0 25-Feb	166.0 26-Sep
California-compliant, cartoned, benchmark	270.0	▼ -6%	287.0	1035.0 28-Feb	270.0 19-Sep
Breaking Stock (negotiated; dlvd prices cents per doz)	103.5	▼ -18%	126.3	633.8 18-Feb	103.5 26-Sep
Whole Frozen Egg (dollars per pound)	1.68	▬ 0%	1.68	5.31 28-Feb	1.35 05-Sep
Whole Dried Eggs (dollars per pound)	12.42	▬ 0%	12.42	25.00 16-May	12.42 19-Sep
Nat'l Average Retail Ad Price - Conventional caged	2.87	▲ 9%	2.63	4.28 11-Apr	1.87 03-Jan
Nat'l Average Retail Ad Price - UEP Cage-free ²	2.73	▼ -18%	3.34	7.99 21-Feb	2.50 17-Jan
Shell Egg Demand Indicator	-4.7	▼ -2.1	-2.6	11.5 02-Jan	-16.1 21-May

¹ mostly high; ² non-organic

U.S. Table Egg Layer Flock Estimates

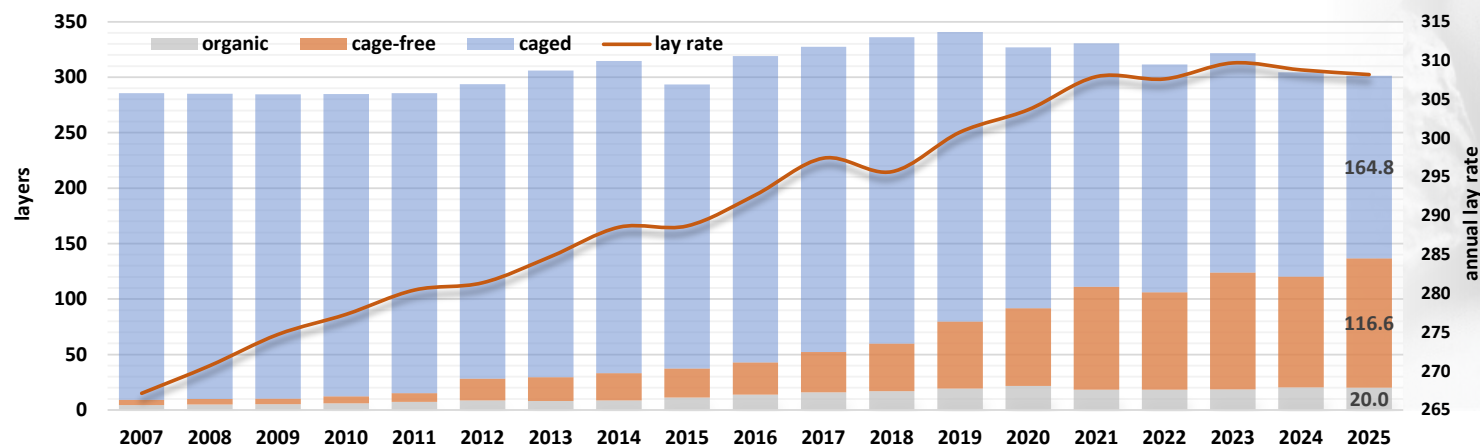
As of September 1, 2025	2025	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012
Total U.S. Caged¹ Flock:	54.7%	58.9%	61.6%	65.9%	66.4%	72.0%	76.6%	82.2%	84.0%	86.6%	87.3%	89.5%	90.3%	90.4%
Layers (millions)	164.8	184.0	197.7	205.3	219.4	235.5	261.0	276.1	275.1	276.1	256.1	281.6	276.4	265.5
Total U.S. Cage-Free Flock:	45.3%	38.5%	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)	136.6	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:	38.7%	32.0%	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)	116.6	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	33.4%	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)	100.5	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	2.8%	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)	8.4	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)	7.7	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	6.6%	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)	20.0	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	4.0%	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)	11.9	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)	4.7	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)	3.4	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 September 2025)



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

Egg Markets Overview

2025 Commercial Table Egg Flock HPAI Losses as of September 26, 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 September 1 was down 9.5% while the cage-free flock was up 15.5% and the organic table egg flock was down 1.9%.

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	

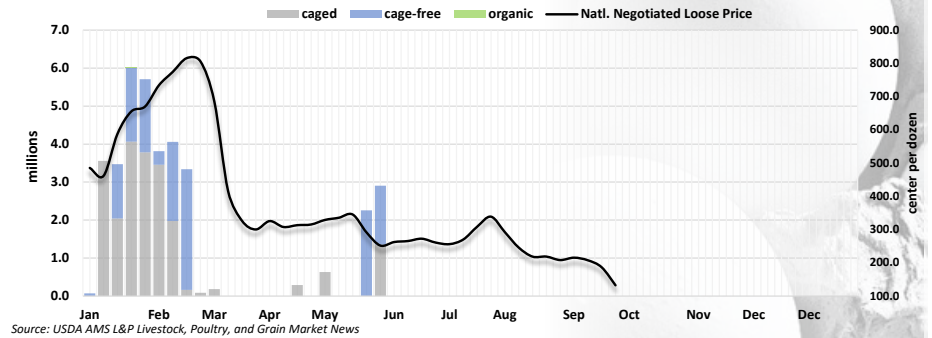
2025 Table Egg Layer Losses

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

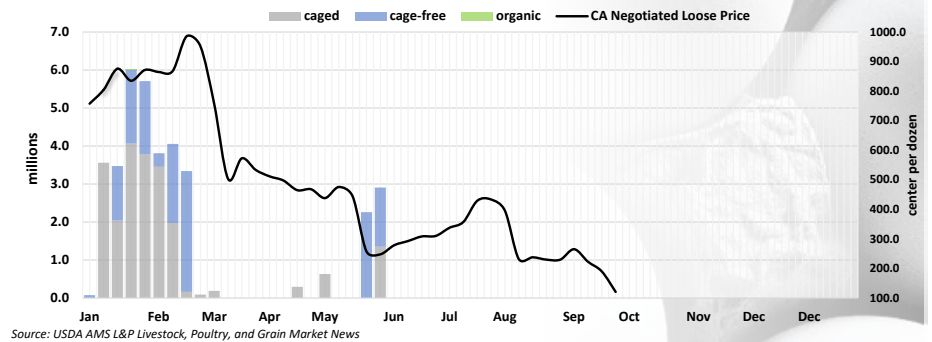
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Totals	Share
AZ	316,600				5,164,300								5,480,900	15%
CA	75,200												75,200	0%
IA		241,600											241,600	1%
IN	2,987,200	3,591,400	187,200										6,765,800	19%
MO	3,910,300												3,910,300	11%
NC	3,314,900												3,314,900	9%
OH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

