

USDA Egg Markets Overview

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

August 29, 2025

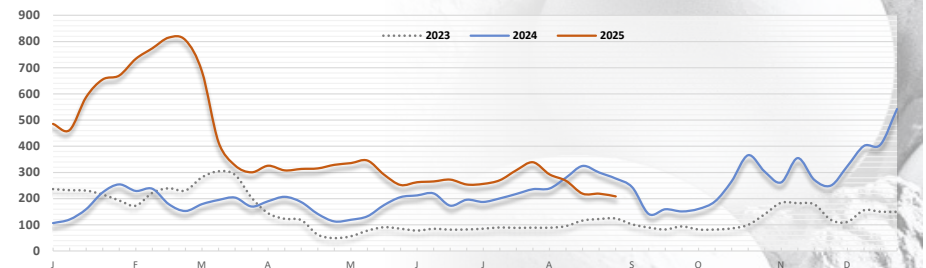
Negotiated wholesale prices for graded loose caged eggs were lower on light to moderate wholesale demand and moderate to good retail for moderate offerings and mostly moderate supplies. Trading is moderate. Wholesale prices for national trading of trucklot quantities of graded, loose, White Large shell eggs declined \$0.10 to \$2.08 per dozen with a steady undertone. The wholesale price on the New York market for formula trading of Large carton shell eggs delivered to retailers held steady at \$2.61 per dozen with a steady undertone. In the major Midwest production region, wholesale prices for Large, white, shell eggs delivered to warehouses decreased \$0.03 to \$2.50 per dozen with a steady undertone while the price to producers for Large carton shell eggs declined to \$2.32 per dozen. The California benchmark for Large shell eggs was unchanged at \$3.09 per dozen with a steady undertone. Delivered prices on the California-compliant wholesale loose egg market was lightly tested and held at \$2.30 per dozen with a mixed undertone. Demand is light to moderate for moderate offerings and supplies. Trading is slow to moderate.

Shell egg demand slowed over the past week as consumers found little price incentive in the local dairy case after the prior week's attractive sale prices expired. Grocers have largely shifted their promotional activity this week to items for the backyard grill with the noted exception of a major retailer promoting specialty shell eggs this cycle. Indications for an increase in promotions in the immediate post-Labor Day ad cycle have the potential to eventually stimulate demand. Demand from egg products manufacturers is generally light to moderate. Since May, the weekly volume of eggs processed has been running well above last year's rate with last week's volume 20% above the year ago level. The inventory of breaking stock has been helping to fuel this pace but has been drawing down with a 10% drop since the start of August despite a gradual increase in egg production – up 3% since May 1. Similarly, the volume of imports that have also lent support to the pace of breaking has continued to slow from its May peak. Processing schedules have been running full to extended but are slowing this week in anticipation of the holiday break adjusting for the coming holiday break.

Overall feature activity rises sharply, driven by nationwide promotions of specialty shell eggs. Feature activity for conventional caged eggs was unchanged and remains limited but the average ad price decreases \$0.15 to \$2.28 per dozen. Featuring of [UEP-certified](#) cage-free shell eggs slows considerably, accounting for only 4% of all shell egg ads this week. The average ad price decreases \$0.11 to \$2.93 per dozen, its lowest point since January. Non-organic and organic free-range and pastured shell egg types dominate this week's ads, driven by nationwide promotion by a major retailer, and account for 87% of all shell egg ads. Brown and white-shelled nutritionally-enhanced types have a cameo role in this week's promotions.

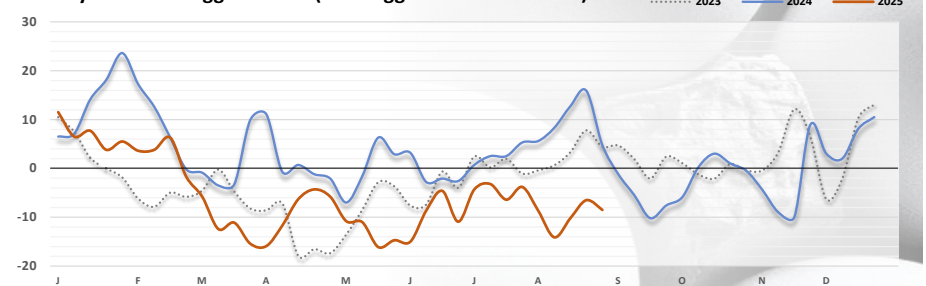
The overall shell egg inventory increased just over 6% and the national inventory of Large class shell eggs rose 11%. Stocks of Large shell eggs in the Midwest production region posted a 27% increase as eggs are being staged to support planned retail feature activity

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	138	2.28	--	--
nutritionally-enhanced	396	4.15	199	3.50
Cage-Free - Non-Organic				
barn/aviary	190	2.98	213	2.88
free-range	--	--	2,424	6.50
pastured	--	--	734	6.59
USDA Organic				
organic	--	--	39	4.81
free-range	--	--	3,978	8.05
pastured	--	--	866	6.82

caged, conventional	2%
caged, ne	6%
CF, barn/aviary	4%
CF, free-range	26%
CF, pasture	8.0%
organic	0%
organic, free-range	43.3%
organic, pasture	9.4%

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

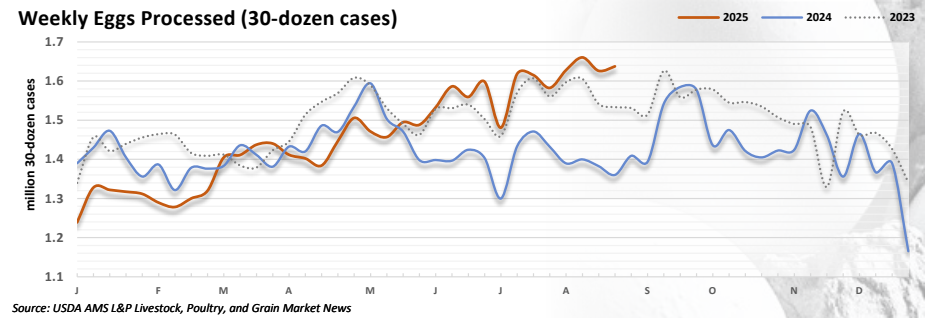
in the immediate, post-Labor Day market week. The inventory share of Large class shell eggs gained 2.5% to a 50% share of all shell egg stocks on inventory at the start of the week. Stocks of cage-free eggs rose just over 5% to support nationwide retail featuring and stocks of organic shell eggs increased 4% for the same reason. Stocks of nutritionally-enhanced eggs declined about one percent and supplies of breaking stock drew down 5% to their lowest level since May as schedules vary in preparation for this week's holiday break. Total estimated table egg production is unchanged from last week and down slightly from last year to a year-to-year deficit the equivalent of 3.6 million cases in total, the closest to year ago levels since June 2024.

The average national wholesale price for breaking stock was unchanged at \$1.40 per dozen with a steady undertone. Demand and offerings are light to moderate with moderate to reduced supplies. Processing schedules are full-time to reduced headed into the holiday weekend and trading is slow to moderate. The volume of eggs processed last week was up just over a half percent and the share of weekly table egg production was unchanged at 35%. Cage-free stock accounted for just 37% of eggs processed last week, up slightly in share. Production of whole egg was up slightly and production of egg components increased with whites by one percent and yolks by nearly 6%. Dried egg production was down 4% and the production of inedible eggs rose by about 7.5%. Breaking yields without inedible improved a third of a pound to 41.84 pounds per case broken.

Wholesale prices for certified liquid whole eggs are steady on light to moderate demand into the holiday week for light offerings and light to moderate supplies. Trading is moderate. Wholesale prices for whole frozen eggs remain too few to publish and last quoted at \$2.00 per pound as are prices for frozen yolk last quoted at \$1.65 per pound. The undertone is steady with light demand and light to moderate offerings and supplies with moderate trading. Prices for dried whole eggs are too few to publish and last quoted at \$16.00 per pound as are those for dried yolk also last quoted at \$16.00 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 mostly moderate.

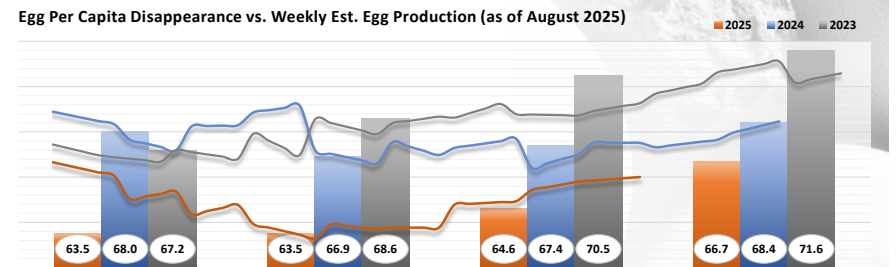
According to NASS, the June monthly volume of frozen eggs in storage increased 7% from May but 48% below the prior year. Stocks of whole frozen egg increased 8%, 44% below last year and the share of whole egg stocks was unchanged at 44% of total frozen stocks. Stocks of frozen yolk increased 16% and 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.

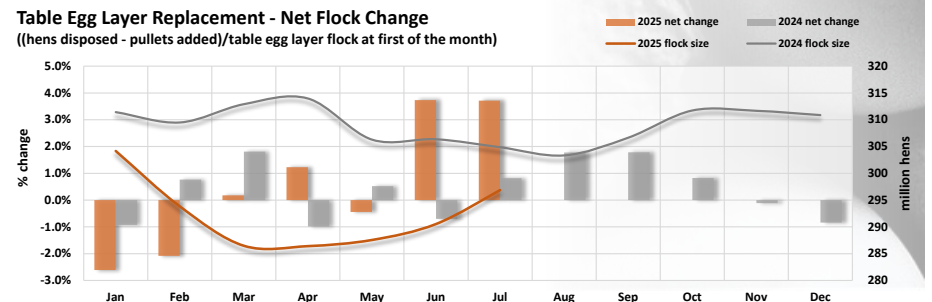


Eggs Processed - Week-to-Week Change							
total	share	case yield*	whole	whites	yolks	dried	inedible
0.7%	0.2%	0.38	0.3%	1.1%	5.8%	-4.1%	7.6%

* case yield w/ inedible in pounds per case.



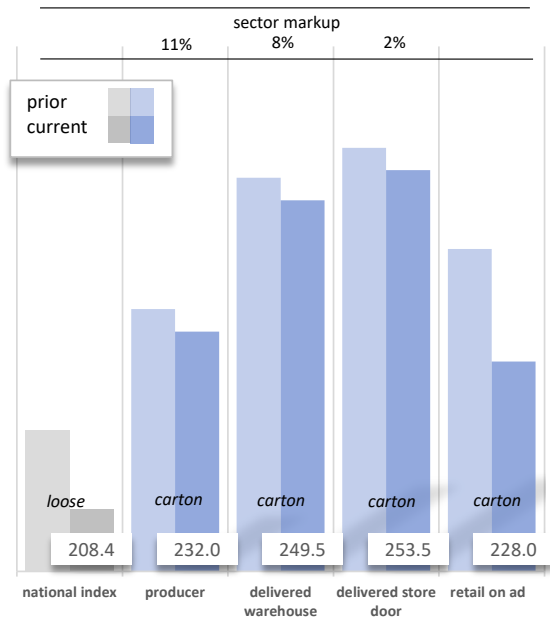
Source: USDA ERS; AMS L&P Livestock, Poultry, and Grain Market News



Shell Eggs Market Price Comparisons

(as of August 29, 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						
	29-Aug	% Change	22-Aug	15-Aug	8-Aug	1-Aug	25-Jul
SHELL EGGS (Large, White, conventional in cents per dozen)							
National, loose (negotiated; f.o.b. dock prices)	208.37	-5%	218.84	218.79	246.13	292.42	338.82
California-compliant, loose, (negotiated delivered)	230.00	0%	230.00	237.91	232.02	395.71	433.55
Midwest, cartoned (formula sales; dlvr'd to warehouse)	249.50	-1%	252.50	277.50	349.50	358.50	339.50
New York, cartoned (formula sales; dlvd to store)	261.00	0%	261.00	264.00	276.00	349.00	370.00
California-compliant, cartoned, benchmark	309.00	0%	309.00	343.00	438.00	476.00	470.00
National Retail Shell Egg (avg. ad price in dollars per dozen)							
Conventional Caged, Large, White	2.28	-6%	2.43	2.50	2.97	3.06	2.68
UEP Cage-Free, Large, Brown	2.93	-4%	3.04	3.20	3.81	3.35	3.71
EGG PRODUCTS (f.o.b. shipper dock prices)							
Breaking Stock (negotiated; dlvd prices cents per doz)	139.75	0%	139.75	140.00	143.75	180.75	189.75
Whole Frozen Egg (dollars per pound)	n/a		n/a	n/a	2.00	2.00	2.10
Whole Dried Eggs (dollars per pound)	n/a		n/a	16.00	17.00	17.00	18.00
Processed Share of Weekly Shell Egg Production	35.2%	0.2%	35.0%	35.8%	35.2%	34.6%	35.4%
SHELL EGG DEMAND INDICATOR (no units)	-8.5	-2.0	-6.5	-10.2	-14.1	-8.7	-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)	29-Aug	Change	22-Aug	2025 High	2025 Low
National, loose (negotiated; f.o.b. dock prices)	208.4	▼ -5%	218.8	816.8	03-Mar
California-compliant, loose, (negotiated delivered)	230.0	▬ 0%	230.0	996.2	26-Feb
Midwest, cartoned (formula sales; dlvr'd to warehouse)	249.5	▼ -1%	252.5	841.5	28-Feb
New York, cartoned (formula sales; dlvd to store)	261.0	▬ 0%	261.0	853.0	25-Feb
California-compliant, cartoned, benchmark	309.0	▬ 0%	309.0	1035.0	28-Feb
Breaking Stock (negotiated; dlvd prices cents per doz)	139.8	▬ 0%	139.8	633.8	18-Feb
Whole Frozen Egg (dollars per pound)	n/a	▬ 0%	n/a	5.31	28-Feb
Whole Dried Eggs (dollars per pound)	n/a	▬ 0%	n/a	25.00	16-May
Nat'l Average Retail Ad Price - Conventional caged	2.28	▼ -6%	2.43	4.28	11-Apr
Nat'l Average Retail Ad Price - UEP Cage-free ²	2.93	▼ -4%	3.04	7.99	21-Feb
Shell Egg Demand Indicator	-8.5	▼ -2.0	-6.5	11.5	02-Jan

¹ mostly high; ² non-organic

U.S. Table Egg Layer Flock Estimates

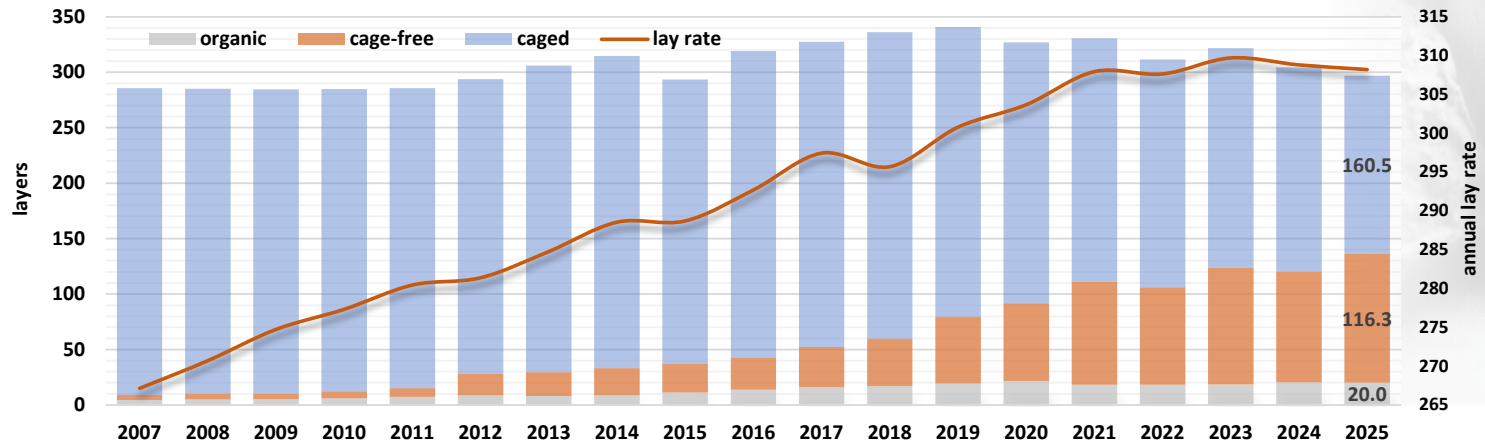
As of August 1, 2025	2025	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012
Total U.S. Caged¹ Flock:	54.1%	58.9%	61.6%	65.9%	66.4%	72.0%	76.6%	82.2%	84.0%	86.6%	87.3%	89.5%	90.3%	90.4%
Layers (millions)	160.5	184.0	197.7	205.3	219.4	235.5	261.0	276.1	275.1	276.1	256.1	281.6	276.4	265.5
Total U.S. Cage-Free Flock:	45.9%	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)	136.4	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:	39.2%	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)	116.3	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	33.8%	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)	100.2	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	6.7%	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)	12.0	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	1.6%	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)	3.3	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 August 2025)



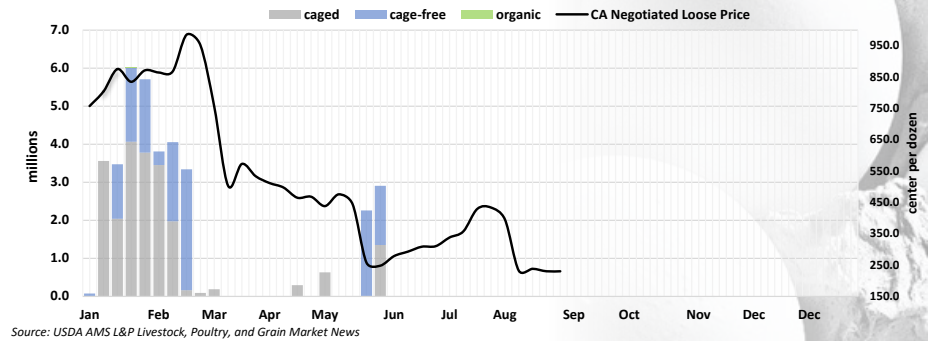
Source: USDA AMS Livestock & Poultry Program, Livestock, Poultry, and Grain Market News Division

2025 Commercial Table Egg Flock HPAI Losses as of August 29, 2025

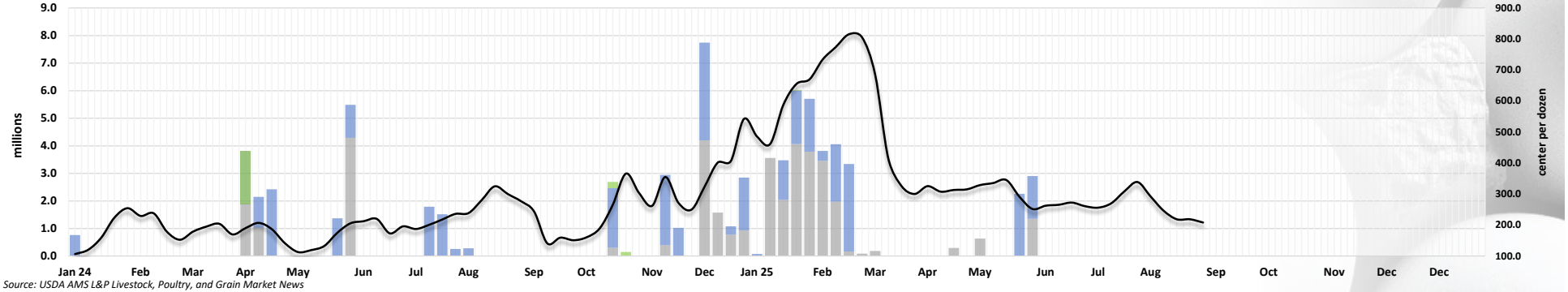
No new outbreaks of highly pathogenic avian influenza (HPAI) were reported over the past week in commercial table egg flocks. In 2025 to date, based on the latest data from APHIS, HPAI in commercial table egg layer flocks have resulted in the depopulation of 36.3 million birds. To date, USDA APHIS has 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 v. California Cage-Free Loose Egg Price



January 2024 to Present - Table Egg Layer Losses by Production System v. Natl Loose Shell Egg Price



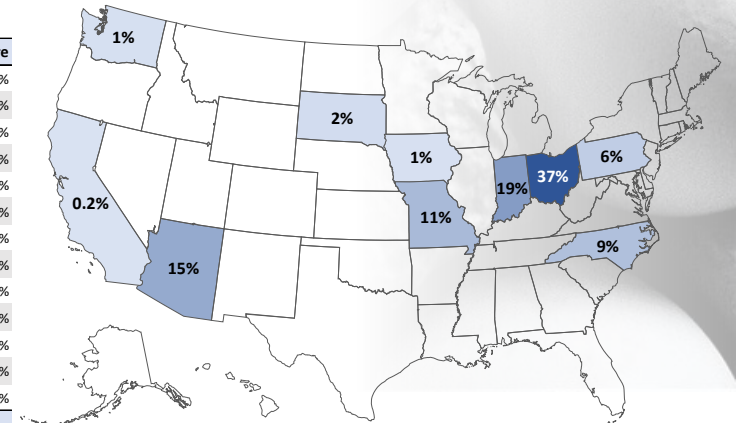
2025 Table Egg Layer Losses

(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%
													-	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

Share by State of Total 2025 Commercial Table Egg Layer Losses



Egg Markets Overview