

USDA Egg Markets Overview

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

January 31, 2025

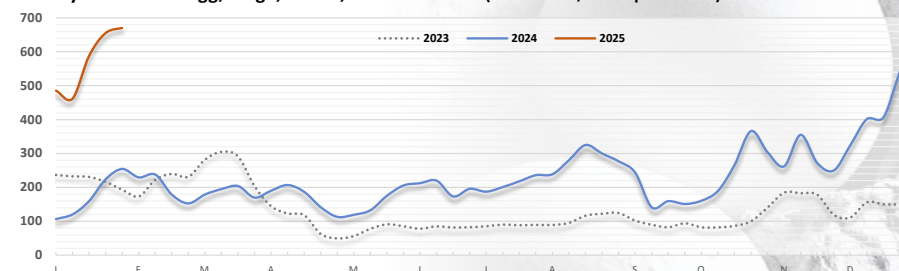
Negotiated wholesale prices for graded loose eggs continue to move higher on very limited volume. Loose egg demand is moderate to good – best into retail channels - for very light offerings. The supply situation, while showing some improvement, still only ranges from very light to moderate and trading is active for available offerings. The volume of trailer load loose egg sales this week decreased 16% with 60% for out-front business. Prices for national trading of trucklot quantities of graded, loose, White Large shell eggs increased \$0.15 to \$6.70 per dozen with a higher undertone. Wholesale prices for formula trading of cartonned shell eggs continue to rise on moderate to good demand for very light offerings and very light to moderate supplies. Trading is very active for the limited offerings. The wholesale price on the New York market for Large cartonned shell eggs delivered to retailers rose \$0.39 to \$7.63 per dozen with a higher undertone. In the major Midwest production region, the wholesale price for Large, white, shell eggs delivered to warehouses increased \$0.54 to \$7.03 per dozen with a higher undertone while prices paid to producers for Large cartonned shell eggs increased \$0.41 to \$7.25 per dozen. The California benchmark for Large shell eggs was unchanged at \$8.97 per dozen with a fully steady undertone. Delivered prices on the California-compliant wholesale loose egg market increased \$0.37 to \$8.72 per dozen with a firm undertone.

Shell egg demand strengthened over the past week as supplies remain tight and competition remains elevated in the spot market. Outbreaks of highly pathogenic avian influenza (HPAI) in 7 states widely spaced across the nation continue to disrupt industry's attempts to return to a more normal supply balance. Shell egg availability remains limited and inconsistent in many retail markets with many affected grocers employing steps to limit consumer purchasing to stretch their existing supplies including limiting or ending promotional activity, placing limits on units purchased per shopping trip, and holding prices at record or near-record highs – none of which helps to spur demand. Conversely, at least one major nation chain is running a feature on shell eggs this ad cycle – further illustrating the inconsistency of supply across the nation. Current demand from egg products manufacturers is light to very light as spot market offerings are very light. Breakers have reduced production and have drawn from owned production and stocks as they await for conditions to improve but some were forced this week to dip into the spot market and wholesale prices rose sharply.

Feature activity for conventional caged Large shell eggs increases sharply and is primarily driven by one nation-wide chain. The average ad price increases \$0.44 per dozen to \$2.68 per dozen. The pace of specialty shell egg featuring dwindles to a trickle with limited ads on nutritionally-enhanced types. Feature activity for [UEP-defined cage-free](#) shell eggs is not recorded this week and the price spread on feature between 12-packs of Large caged eggs and UEP cage-free eggs is not calculated this week.

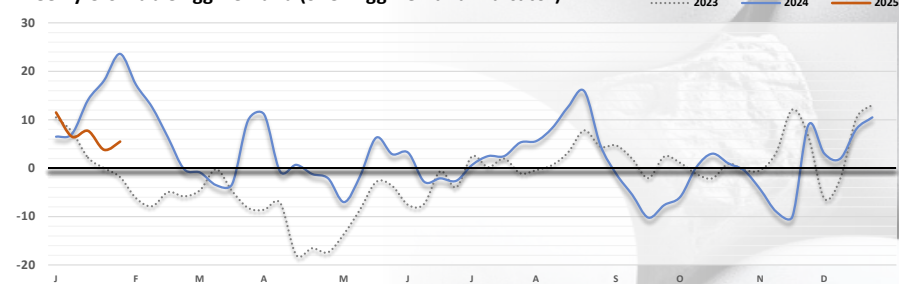
The overall shell egg inventory declined 2% and the national inventory of Large class shell eggs lost 1%. Stocks of Large shell eggs in the key Midwest region gained just under 4% as marketing continues to struggle with insufficient supplies to meet the desired need. The inventory share of Large class shell eggs remained at a 50% share of all shell egg

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					caged, conventional	83%
conventional	1,145	2.68	--	--	caged, ne	14%
nutritionally-enhanced	29	3.33	166	5.77	CF, barn/aviary	0%
Cage-Free - Non-Organic					CF, free-range	0%
barn/aviary	--	--	--	--	CF, pasture	1%
free-range	--	--	--	--	organic	0%
pastured	--	--	15	7.99	organic, free-range	1%
USDA Organic					organic, pasture	1%
organic	--	--	--	--		
free-range	--	--	15	6.29		
pastured	--	--	15	9.69		

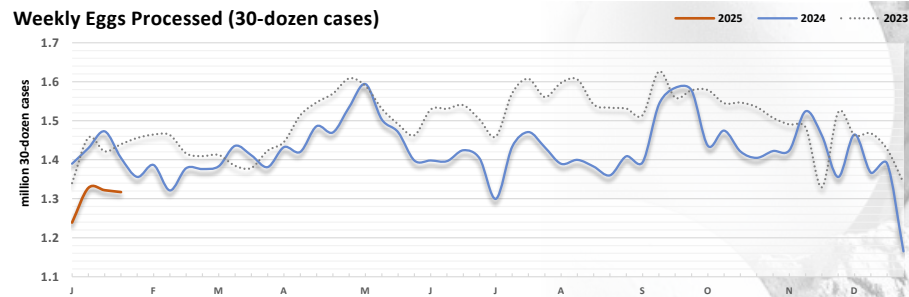
stocks on inventory at the start of the week. Stocks of cage-free eggs rose just over 2.5% while stocks of nutritionally-enhanced eggs were down 25% as eggs cleared to support regular program featuring at retail outlets. Stocks of organic shell eggs declined 5% as these types have become price competitive with conventional shell eggs and are being used more frequently in grocer promotions. Breaking stock inventory declined 7% as breakers continue to draw on stocks to operate given continued very limited spot market offerings. Total estimated table egg production is about unchanged from last week and from last year to a year-to-year deficit the equivalent of 6.6 million cases in total.

Wholesale prices for breaking stock in the Central States increased \$0.85 to \$3.90 per dozen with a firm undertone. Demand is light to very light while offerings are very light with light to occasionally moderate supplies and reduced to occasionally full-time schedules. Trading is moderate. Breakers have been working from stocks and owned production to run at a rate currently 6% below that of one year ago. The volume of eggs processed last week decreased a half percent while the share of weekly table egg production was unchanged at 28%. Production of whole egg was down about 1.5% while production of whites rose 3% and that for yolks declined just over one percent. Production of dried egg decreased nearly 3.5% and inedible egg production was down about 4%. Breaking yields without inedible declined slightly to 42.28 pounds per case broken.

Wholesale prices for certified liquid whole eggs are higher than the last test with a higher undertone. Demand is moderate to very good for light to very light offerings and trading is moderate to active. Wholesale prices on frozen eggs are sharply higher with frozen whole egg up \$0.34 to \$3.11 per pound and frozen whites up \$1.59 to \$3.50 per pound. The undertone is higher with moderate to good 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 higher with moderate to good demand for light to very light offerings and supplies. Trading is moderate to 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.

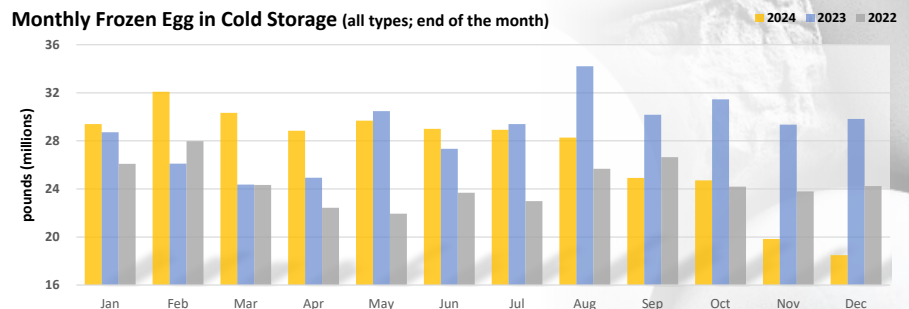
As of January 1, 2025, the estimated U.S. non-organic commercial cage-free table egg flock stood at 101 million, 33% of the current U.S. table egg flock. This represents a 3% decline in the number of layers from January 2024 with no decline in share. The decline in the non-organic cage-free flock was the result of the loss of 22 million non-organic cage-free layers to HPAI – equal to 21.5% of the flock on January 1, 2024. However, producer recovery strategies were successful in offsetting a significant portion of these losses (82%), resulting in an estimated net loss in the non-organic cage-free flock of 4 million layers by the end of 2024.



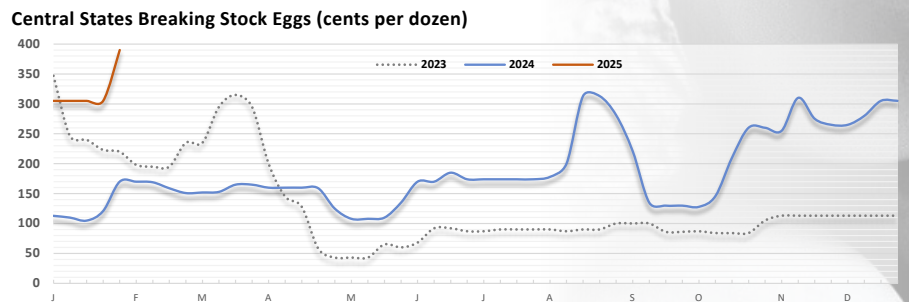
Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

Eggs Processed - Week-to-Week Change							
total	share	case yield*	whole	whites	yolks	dried	inedible
-0.4%	0.0%	-0.10	-1.4%	3.3%	-1.3%	-3.4%	-4.2%

* case yield w/ inedible in pounds per case.



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

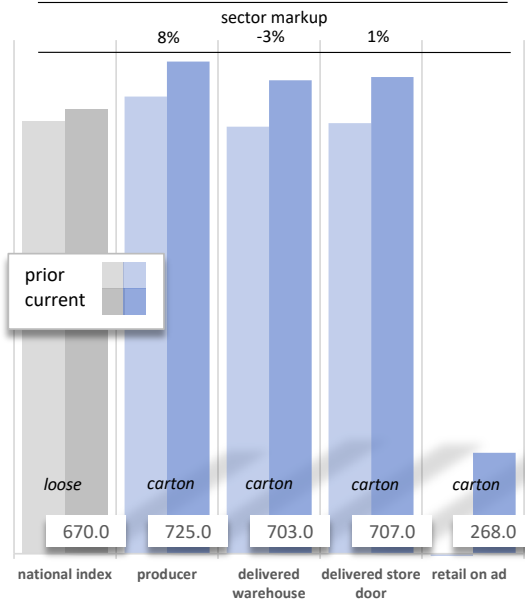


Source: USDA AMS L&P Livestock, Poultry, and Grain Market News

Shell Eggs Market Price Comparisons

(as of January 31, 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

	31-Jan	% Change	Recent History				
			24-Jan	17-Jan	10-Jan	3-Jan	27-Dec
SHELL EGGS (Large, White, conventional in cents per dozen)							
National, loose (negotiated; f.o.b. dock prices)	670.00	2%	655.00	587.50	461.71	485.33	542.36
California-compliant, loose, (negotiated delivered)	872.00	4%	835.33	876.00	804.41	757.80	722.00
Midwest, cartoned (formula sales; dlvr'd to warehouse)	703.00	8%	649.00	606.00	591.00	575.00	551.00
New York, cartoned (formula sales; dlvd to store)	763.00	5%	724.00	672.00	625.00	606.00	594.00
California-compliant, cartoned, benchmark	897.00	0%	897.00	897.00	897.00	897.00	897.00
National Retail Shell Egg (avg. ad price in dollars per dozen)							
Conventional Caged, Large, White	2.68	20%	n/a	2.24	2.36	1.87	2.14
UEP Cage-Free, Large, Brown	n/a		2.50	2.64	2.99	n/a	3.01
EGG PRODUCTS (f.o.b. shipper dock prices)							
Breaking Stock (negotiated; dlvd prices cents per doz)	390.00	28%	305.00	305.00	305.00	305.00	305.00
Whole Frozen Egg (dollars per pound)	3.11	12%	2.77	2.69	n/a	2.69	n/a
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	28.1%	0.0%	28.1%	28.1%	26.2%	24.5%	28.4%
SHELL EGG DEMAND INDICATOR (no units)							
	5.5	1.7	3.8	7.7	6.5	11.5	10.5

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)	31-Jan	Change	24-Jan	2025 High	2025 Low
National, loose (negotiated; f.o.b. dock prices)	670.0	▲ 2%	655.0	670.0	461.7
California-compliant, loose, (negotiated delivered)	872.0	▲ 4%	835.3	876.0	800.0
Midwest, cartoned (formula sales; dlvr'd to warehouse)	703.0	▲ 8%	649.0	703.0	575.0
New York, cartoned (formula sales; dlvd to store)	763.0	▲ 5%	724.0	763.0	604.0
California-compliant, cartoned, benchmark	897.0	▬ 0%	897.0	897.0	897.0
Breaking Stock (negotiated; dlvd prices cents per doz)	390.0	▲ 28%	305.0	390.0	305.0
Whole Frozen Egg (dollars per pound)	3.11	▲ 12%	2.77	3.11	2.69
Whole Dried Eggs (dollars per pound)	n/a	▬ 0%	n/a		
Natl Average Retail Ad Price - Conventional caged	2.68	▲ 20%	n/a	2.68	1.87
Natl Average Retail Ad Price - UEP Cage-free ²	n/a	▬ 0%	2.50	2.99	2.50
Shell Egg Demand Indicator	5.5	▲ 1.7	3.8	11.5	3.8

¹ mostly high; ² non-organic

2025 Commercial Table Egg Flock HPAI Losses

Outbreaks of highly pathogenic avian influenza (HPAI) in commercial table egg layer flocks that resulted in the depopulation of 13.2 million birds in December 2024 continue into January 2025. As of this week, 16 APHIS-confirmed outbreaks in 7 states (AZ, CA, NC, OH, MO, IN, and WA) have resulted in the loss of 14 million birds – 11.9 million (85%) in conventional caged systems, 2.1 million (15%) in cage-free systems, and 26,000 organic (0.2%). These losses represent 6.5% of the conventional caged layer flock, 2.1% of the non-organic cage-free flock, and 0.1% of the organic flock on January 1, 2025.

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 being felt in the retail cartoned sector.

2025 Table Egg Layer Losses by Production System

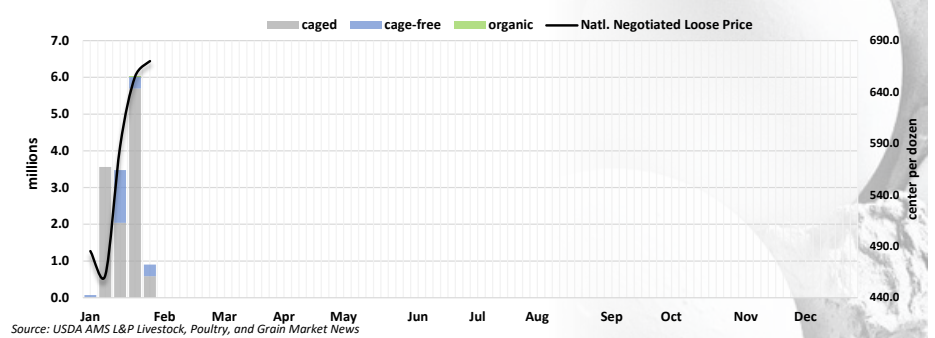
System	Loss	Share
Conventional Caged.....	11,885,000	85%
Cage-Free.....	2,131,600	15%
Organic.....	26,100	0.2%
Total	14,042,700	

2025 Table Egg Layer Losses

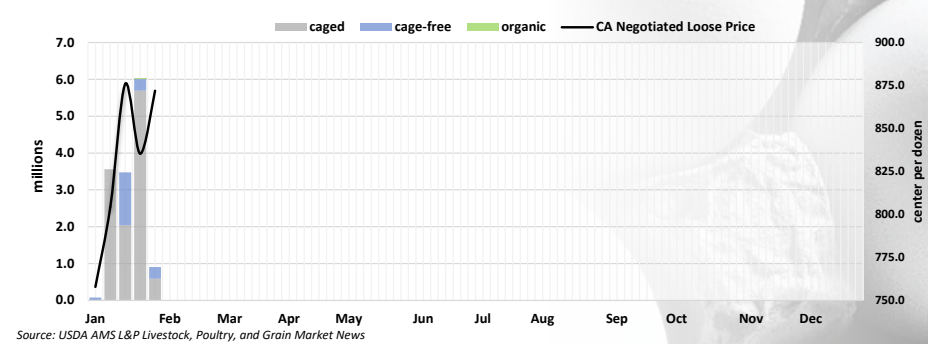
(layers lost to Highly Pathogenic Avian Influenza (HPAI))

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Totals
CA	75,200												75,200
NC	3,314,900												3,314,900
OH	5,152,400												5,152,400
MO	3,910,300												3,910,300
IN	965,500												965,500
WA	307,800												307,800
AZ	316,600												316,600
													-
													-
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Total:	14,042,700												14,042,700

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



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



Share by State of Total 2025 Commercial Table Egg Layer Losses

