

# J Sights Corporation

## Overseas Egg and Egg Product Information

December 8, 2025

### 【Europe】

1. Although major poultry companies show willingness to expand flocks, the number of laying hens remains under regulatory control by the European Commission. As a result, flock expansion has not progressed as expected, and egg production continues to be sluggish.
2. Eggs, as a relatively inexpensive and high-quality source of protein, have secured their position as a substitute for meat. Demand for table eggs remains firm and stable.
3. Egg prices are once again on an upward trend, surpassing the mid-to-late March peak and reaching the highest level since the beginning of the year. With the Christmas season approaching, demand is expected to rise further, leading to additional price increases.
4. Between December 7, 2024 and March 7, 2025, 743 cases of avian influenza were confirmed across 31 countries (239 cases in poultry). Transmission to domestic cats and wild carnivores has also been reported.
5. Since September 2025, avian influenza has been detected in Balkan countries such as Croatia and Serbia, as well as Estonia, Greece, and other European nations outside Turkey. Most recently, on November 21–22, an outbreak was confirmed at a poultry farm in Flanders, Belgium, resulting in the culling of 257,350 birds.
6. Demand for whole eggs and egg yolks remains strong, with yolk demand particularly robust and supply unable to keep pace. Production within the EU alone cannot meet demand, leading to increased imports of yolk powder from China and India.

Due to exceptionally high yolk prices driven by strong demand, egg white prices remain very low relative to overall egg prices. Near-term demand for egg whites is unlikely to increase, and the current situation of low whites and high yolks/whole eggs is expected to persist.

### 【United States】

1. Although major egg producers are actively seeking to expand flocks, the timing coincides with outbreaks of avian influenza, and the expected increase in laying hen numbers has not materialized. Between 2022 and May 2025, more than 165 million laying hens were culled due to avian influenza, which remains the primary cause of reduced flock size.
2. According to USDA data, as of September 7, 2025, the number of mature laying hens stood at 293.5 million. USDA further announced that by early December, the figure would reach 310 million. This remains only about 95% of the pre-epidemic average of 326 million in 2021, indicating that recovery is still incomplete.
3. As in the EU, animal welfare initiatives are gaining momentum in the U.S., with a shift from conventional cage systems to cage-free housing (floor or free-range). Currently, nearly 45% of laying hens are cage-free. This trend is expected to continue, with nine states including California and Nevada announcing bans on the sale of non-cage-free eggs by 2026. Industry experts forecast that by 2030, more than 57% of U.S. laying hens will be cage-free.

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4. Leading producers such as Cal-Maine Foods (the world's largest), Rose Acre Farms (U.S. No. 2, world No. 3), Versova Holdings, and Hillandale Farms are investing heavily to expand free-range capacity.
5. Since October, egg demand has entered its seasonal peak. Shell egg prices have edged upward, though by late November they were only about one-sixth of the levels seen in February–March. Lower retail prices and recognition of eggs as a high-quality protein source have supported strong household consumption.
6. Prices for powdered eggs have also declined compared to spring 2025: whole egg and egg white powders are down about 40%, and yolk powder about 50%. However, given the abnormally high spring levels, current prices are not perceived as particularly low. Powdered egg manufacturers remain cautious, with limited expansion in production.
7. As the peak season for avian influenza approaches, global discussions are intensifying on the potential use of vaccines, including in the U.S., EU, and Japan, and this development will need to be closely monitored.
8. The U.S., with its abundant feed grain production and relatively low energy costs, retains unique advantages for poultry farming, and a recovery of the industry is anticipated.

## 【Other Regions】

1. China's poultry industry is rapidly scaling up in line with the U.S. model, with more integrated facilities where farms and processing plants are located on the same site. Exports of whole egg powder and yolk powder to Japan are increasing, particularly for use in the bakery sector. In the EU, where shortages and soaring prices persist, imports of Chinese egg products—especially yolk powder—are expanding. However, political tensions between China and Japan, combined with Japan's tendency to seek lower contract prices than the EU, may hinder further growth in exports to Japan.
2. In India, shell egg prices continue to rise, though they remain lower than in the EU and U.S., keeping product prices relatively competitive. More farms are investing in breaking and drying equipment to produce powdered eggs, though quality remains inconsistent. While Indian egg products currently hold a price advantage over Western products, factors such as rising domestic egg prices, growing local demand, and increased overseas interest may drive prices higher in the future.

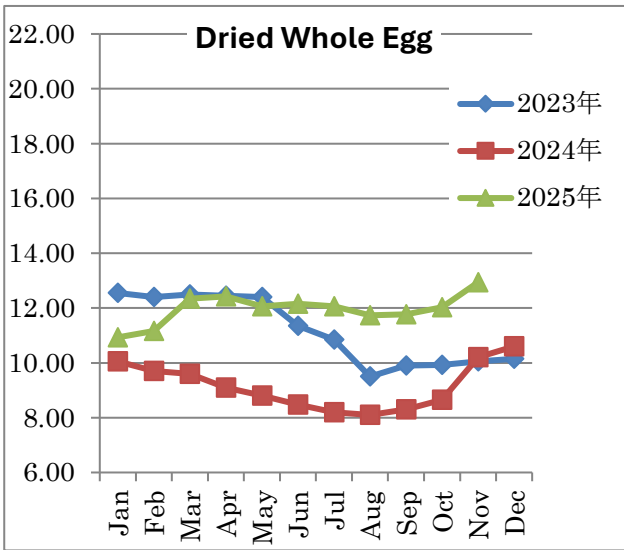
When handling imports, timely and accurate information, combined with sound judgment, is essential. Our company leverages a global network to provide rapid and reliable intelligence. Beyond egg products, we also specialize in proteins, dairy, and processed meat products. Please feel free to contact us for any inquiries.

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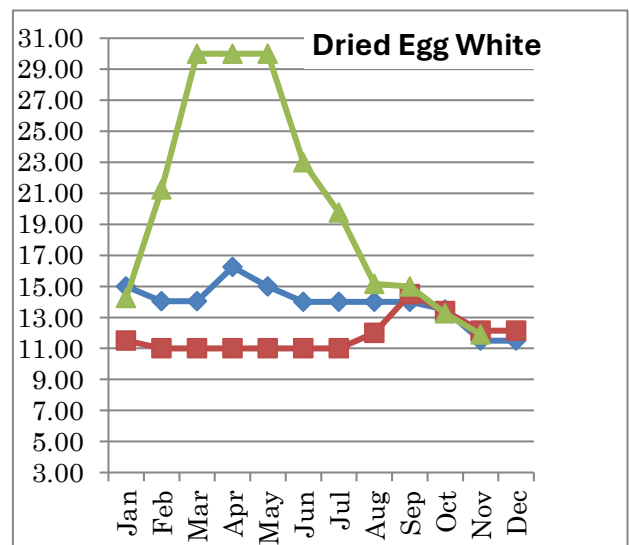
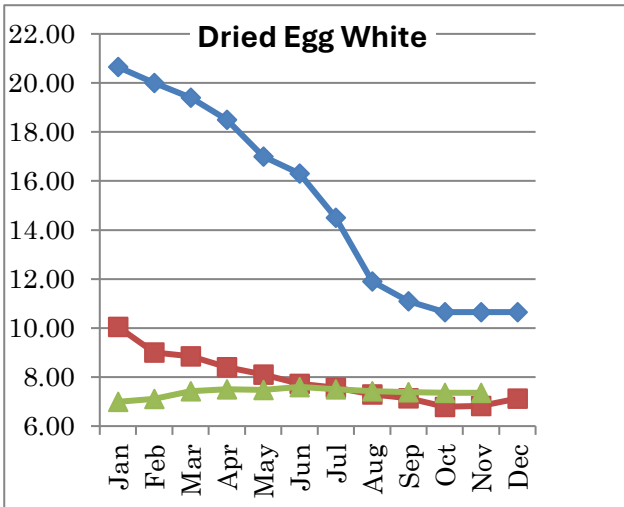
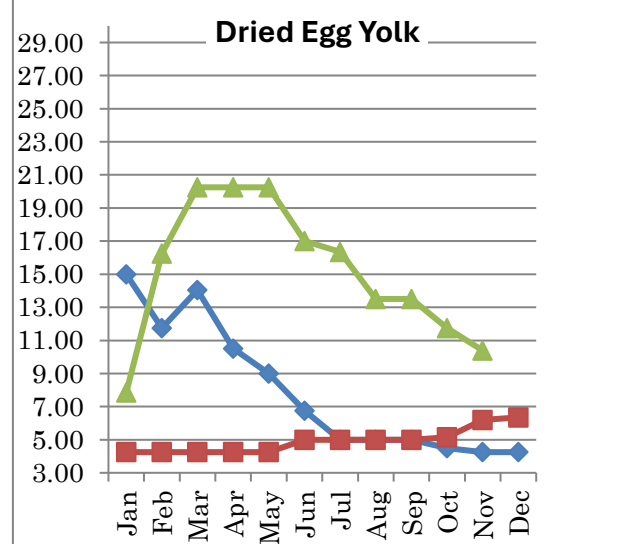
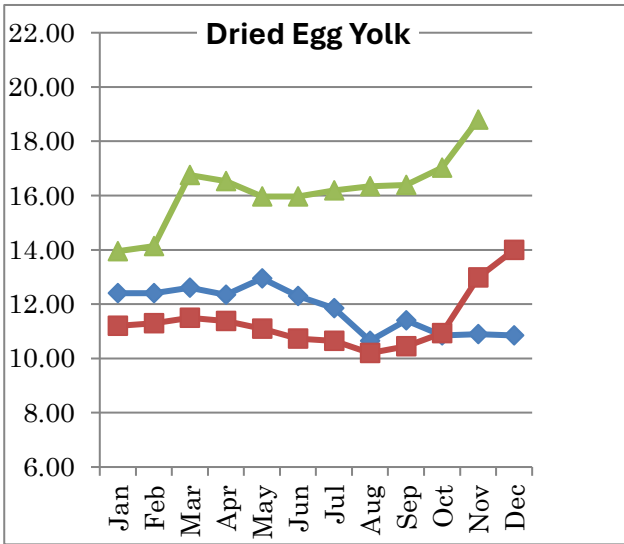
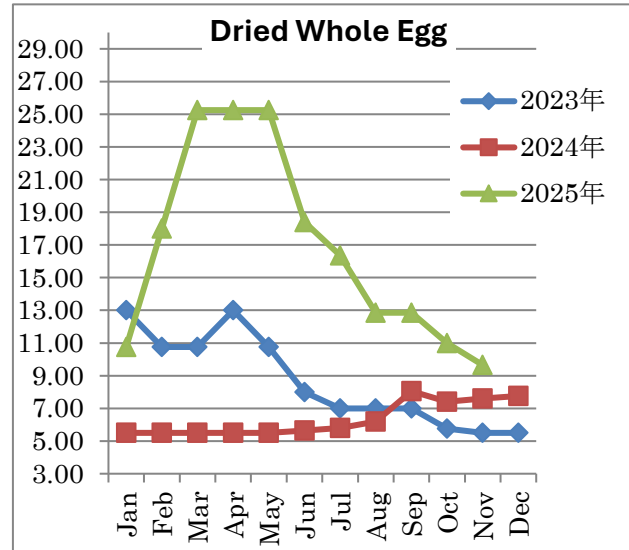
**Next Page: Graphs showing EU and U.S. whole egg price trends (€/kg and USD/kg) are provided.**

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EU Price Trends (€/kg)



USA Price Trends (USD/lb)



\*"Urner Barry" quotations at the beginning of each month and Ex-works prices basis.