

J Sights Corporation

Overseas Egg and Egg Product Information

February 16th, 2026

【Europe】

The European market is currently undergoing a transitional phase following the conclusion of the holiday season.

1. Throughout 2025, several factors constrained the expansion of layer hen populations, which remain at just under 400 million birds across the EU. Key challenges included stringent bird welfare regulations, sustained high costs for feed and energy, and increased labor and logistics expenses. Furthermore, the persistent risk of Highly Pathogenic Avian Influenza (HPAI), particularly in major producing countries like Poland, continues to affect supply stability.
2. Regarding egg products, demand for egg yolk remains robust, consistently exceeding domestic production capacity within the EU. Consequently, EU processors are maintaining imports of shell eggs from non-EU countries such as Turkey and Ukraine, while also increasing imports of dried whole egg and egg yolk from China and India. While Italian and German manufacturers have secured large-scale contracts (some exceeding 1,000 tons) for yolk-rich products, the market for dried egg white remains saturated with excess inventory. Prices for dried egg white have trended downward since the latter half of 2025. In response, processors are diversifying into value-added products, such as high-protein and hydrolyzed egg white derivatives.
3. Looking ahead to 2026, the focus will be on the extent of price corrections. Since late 2025, a reversal in price trends has been observed. While this may be partly seasonal, it likely signals a broader market adjustment following a period of exceptionally high prices.

【United States】

The U.S. market is experiencing a significant shift in price dynamics.

1. As of December 1, 2025, the domestic layer population reached 328.5 million birds—a substantial increase from the 270–280 million recorded in June 2025. This recovery is attributed to aggressive expansion by major producers and a lack of large-scale HPAI outbreaks since early October 2025.

J Sights Corporation

Shell egg wholesale prices, which peaked at a record \$8.50 per dozen in February 2025, collapsed to \$0.15 per dozen within a single year, marking a historic low for this century. This downward pressure is driven by several factors:

- **Decreased Household Consumption:** Domestic retail demand has weakened.
 - **Reduced Industrial Demand:** Commercial demand has declined due to a lack of promotional activities and high inventory levels of frozen and dried egg products.
 - **Inventory Surplus:** Producers, wholesalers, and processors are all currently holding significant surpluses.
2. Prices for frozen and dried egg products have followed this downward trajectory, with U.S. yolk products now trading at lower prices than their EU counterparts. The rapid accumulation of inventory in the U.S. is expected to impact global markets, potentially leading to aggressive export pricing as producers seek to liquidate excess stock.
 3. However, the risk of HPAI remains a critical variable. The current absence of outbreaks is poorly understood and may be temporary. Any resurgence of the virus could cause the current low prices to spike abruptly, underscoring the inherent volatility of the U.S. market.

We provide accurate and timely information on global egg and egg product markets through our international network of industry experts. Should you have any questions or require further clarification, please do not hesitate to contact us.

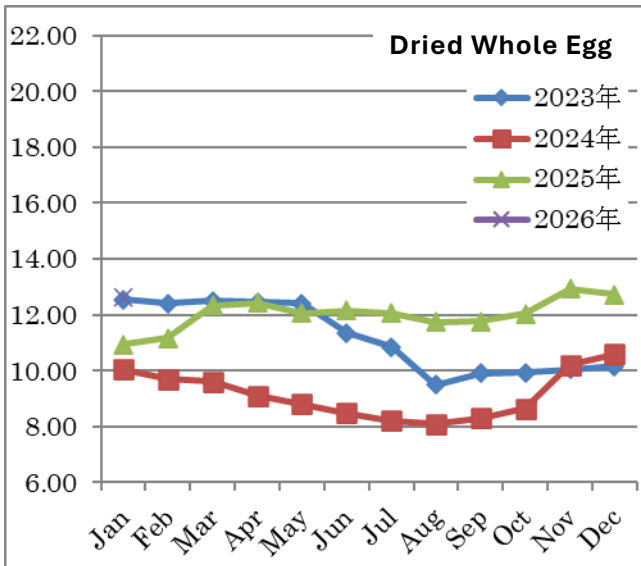
[CONTACT US](#)

Data Appendix:

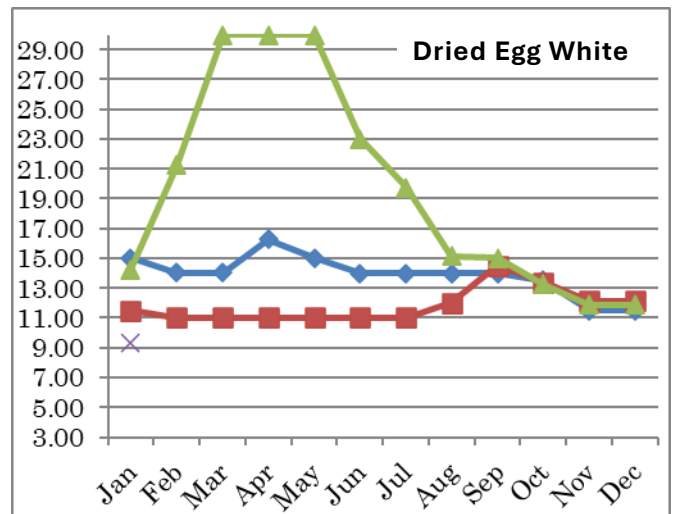
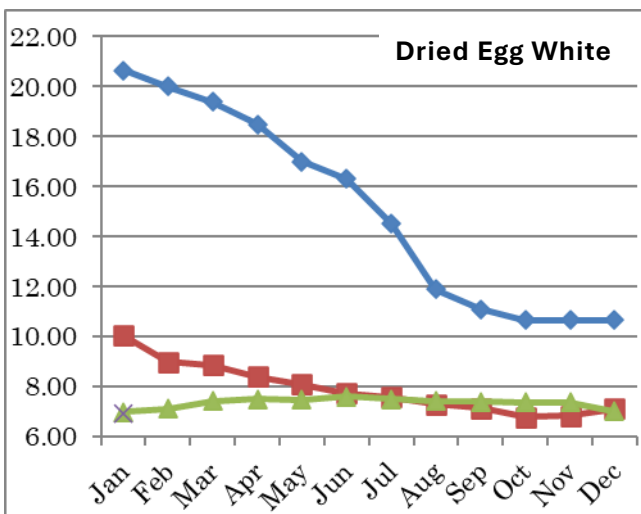
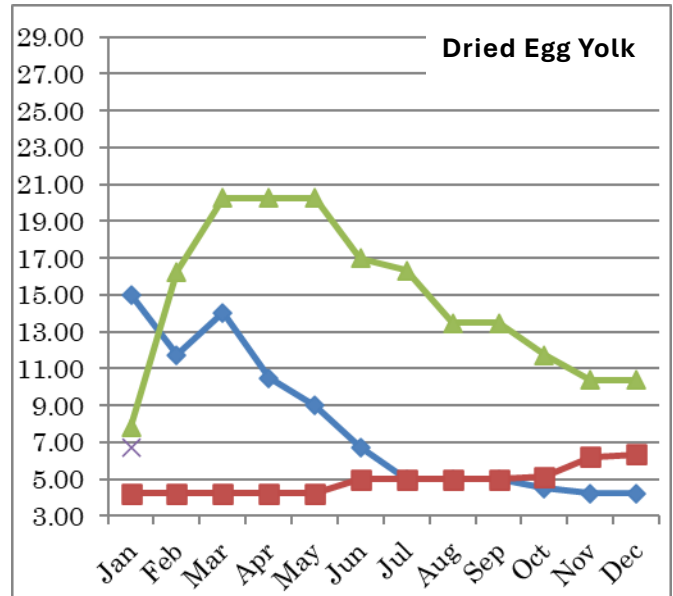
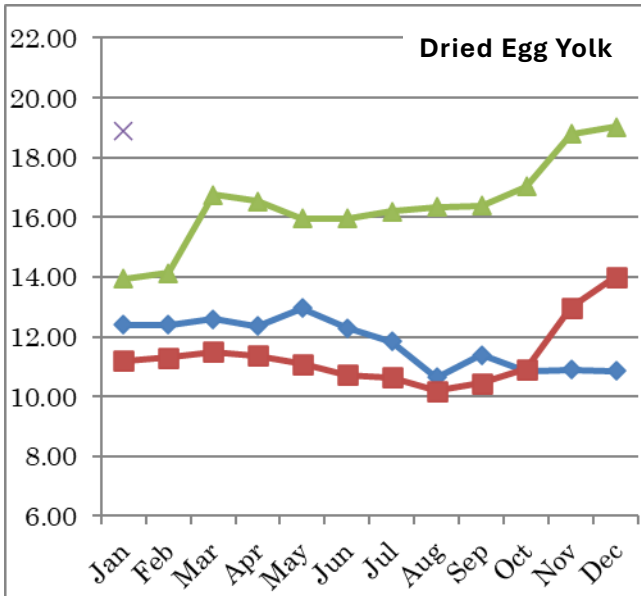
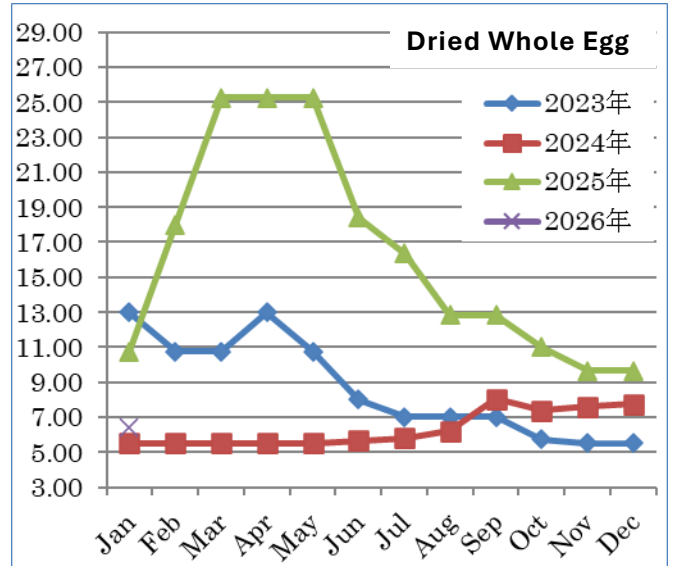
Historical price trends for whole eggs in the EU and USA are presented in the charts on the following page.

J Sights Corporation

EU Price Trends (€/kg)



USA Price Trends (USD/lb)



* "Urner Barry" quotations at the beg. of each month.

* Ex-works prices basis.