

The US Shell Eggs Market: Analysis By Production, By Consumption, By Type (Caged, Free Range & Cage Free and Pasture Raised), By Distribution Channel (Retail, Breaker, Institution and Export), Size and Trends with Impact of COVID-19 and Forecast up to 2028

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Abstracts

The US shell eggs market was valued at US\$13.74 billion in 2022 and is expected to be worth US\$16.20 billion in 2028. Shell eggs have earned their place in American households for their versatility. They can be scrambled, fried, poached, boiled, and incorporated into countless recipes, making them an incredibly flexible ingredient. From omelets and quiches to cakes and custards, eggs serve as a fundamental component in various culinary creations. Beyond their versatility, eggs pack a nutritional punch. They are an excellent source of high-quality protein, providing all the essential amino acids required by the human body. According to the United Egg Producers, per capita consumption of eggs has increased from 251 eggs in 2001 to 277.5 eggs in 2022.

The US egg industry is well-positioned to meet the growing demand for eggs. The industry is highly efficient and productive, and it has a strong commitment to food safety. The industry is also investing in research and development to improve the quality and safety of eggs. In addition, the demand for specialty eggs is also expected to grow in the coming years. This trend is likely due to consumer concerns about animal welfare and the environment. As a result, many egg producers are expected to switch to producing specialty eggs, thus providing lucrative opportunities to the market. The market is expected to grow at a CAGR of 2.79% over the projected period of 2023-2028.

The US shell egg market's production has reached 261.62 millions of 30 dozen cases in 2022. The US is among the world's largest producers of eggs, with an annual production of over 90 billion eggs. The US egg industry is highly efficient, with a production rate of over 270 eggs per hen per year. This is due in part to the use of advanced breeding techniques and improved feed rations. The US egg industry is also highly regulated. The US Department of Agriculture (USDA) sets standards for egg production, including requirements for animal welfare, food safety, and labeling. These standards help to ensure that US eggs are safe and of high quality. The egg industry is constantly innovating, with new technologies being developed to improve the production, quality, and safety of eggs. These innovations are expected to continue in the coming years, leading to even better eggs for consumers.

Market Segmentation Analysis:

By Type: The report provides the bifurcation of the market into three segments based on the type: Caged, Free Range & Cage Free and Pasture Raised. The caged shell eggs segment dominated the market in 2022. Caged shell eggs refer to eggs produced by hens housed in cages. The hens are typically confined to small cages, providing limited space for movement. Caged egg production is highly standardized and allows for consistent quality and size of eggs. This consistency can be advantageous for certain industries, such as bakeries or food manufacturers, that require uniform egg sizes for their production processes. Caged shell eggs often have a longer shelf life due to reduced exposure to environmental factors. They are widely available throughout the year, meeting the consistent demand from consumers and foodservice establishments, driving the market growth. However, Caged egg is losing share due to state mandates that require cage-free production and consumer preference for more humane production.

By Distribution Channel: The report further provides the segmentation of shell eggs production on the basis of distribution channel: Retail, Breaker, Institution and Export. Retail emerged as a prominent segment, accounting for a major share in the US market. Retail distribution involves the sale of shell eggs through various retail channels, such as supermarkets, grocery stores, convenience stores, and online platforms. The retail shell egg market is a large commodity category with high household penetration dominated by industrial farms. The retail segment is driven by consumer demand for shell eggs for household consumption. Retail channels provide convenient access to shell eggs for consumers. Supermarkets and grocery stores are located in local communities, making it easy for consumers to purchase eggs while doing their routine shopping. Online platforms also offer the convenience of doorstep

delivery. Retail distribution offers a range of egg options, including different sizes, grades, types (organic, free-range, specialty), and packaging. Additionally, branding and marketing efforts by egg producers and retailers influence consumer preferences and drive growth.

Market Dynamics:

Growth Drivers: One of the key drivers of the market's expansion is the growth in increasing population and consumer demand. Increasing population and consumer demand are key driving factors for the growth of the shell egg market in the US. The country's population has been steadily increasing over the years, leading to a greater need for food to meet the dietary requirements of a larger number of people. As the population grows, so does the demand for essential food items. This increased demand drives the growth of the shell egg market, leading to higher production and distribution. Other significant growth factors of the market include, growing food industry, online retail and direct-to-consumer models, shift in dietary patterns, growing health and nutrition awareness and growing demand of specialty eggs.

Challenges: However, some challenges are impeding the growth of the market such as increasing demand for egg substitutes, breakage of shell eggs and disease outbreaks. Disease outbreaks, such as avian flu, pose a significant challenge to the US shell egg market. Avian flu is a highly contagious viral disease that primarily affects birds, including chickens, turkeys, and ducks. Disease outbreaks like Avian flu often lead to the culling of infected or exposed birds to prevent the spread of the disease. As a result, there is a decrease in the overall egg supply, leading to shortages in the market. This can disrupt the regular availability of shell eggs and impact consumer access to this essential food item. Moreover, the reduced supply of shell eggs due to flu outbreaks can lead to an increase in prices.

Trends: The market is projected to grow at a fast pace during the forecast period, due to increasing demand for cage-free and organic eggs, increasing adoption of sustainable farming practices, technological advancements and automation and traceability and transparency. The shift towards cage-free eggs is driven by the growing concern for animal welfare. Consumers are increasingly aware of the cramped conditions and limited mobility that hens face in conventional cage systems. Cage-free systems provide hens with more space to move, perch, and engage in natural behaviors, which resonates with consumers who prioritize animal welfare. Moreover, the demand for organic eggs is fueled by consumers' desire for healthier and more natural food options. Organic eggs come from hens that are fed organic feed without the use of antibiotics,

hormones, or genetically modified organisms (GMOs). Consumers who prioritize organic products are willing to pay a premium for eggs that meet these standards.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 impact on the US shell egg market was mixed. There were some negative impacts, such as increased prices and disruptions to the supply chain. However, there were also some positive impacts, such as increased consumer awareness of the importance of eggs and increased investment in egg production. Farms and processing facilities implemented health and safety measures to protect workers, which led to reduced staffing levels and slower production rates. Additionally, logistical challenges arose due to transportation disruptions, causing delays in delivering eggs to retailers and foodservice establishments. The pandemic also impacted the export of the US shell eggs.

The post-COVID landscape would have a profound impact on the US shell eggs market, prompting companies to navigate the new normal and embrace strategies that enhance their production capacity while fostering sustainability. This period presents an opportunity for industry players to reassess their operations, invest in technological advancements, and adopt innovative practices that optimize efficiency and reduce environmental impact.

Competitive Landscape:

The competitive landscape of the US shell eggs market is comprised of several players operating in the industry. These companies vary in terms of size, production capacity, and market share. Alongside the market leaders, numerous regional and local egg producers operate in specific geographic areas. These companies cater to local markets, emphasizing the freshness and quality of their eggs. They often have strong relationships with local retailers and consumers. 72% of egg production in the US comes from the top 25 producers, which generally use industrial farms with large flocks to produce eggs.

The key players in the US shell eggs market are:

Cal-Maine Foods, Inc.

Vital Farms, Inc.

MPS Egg Farms

Herbruck's Poultry Ranch

Michael Foods, Inc.

Daybreak Foods

Versova Holdings LLP

Kreider Farms

ISE America, Inc.

Minnich Poultry LLC

Braswell Eggs

The shell eggs market also sees the emergence of new and innovative players. These companies may introduce unique products, adopt advanced production techniques, or leverage technology to enhance distribution and consumer engagement.

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