

# Monthly dashboard – Eggs

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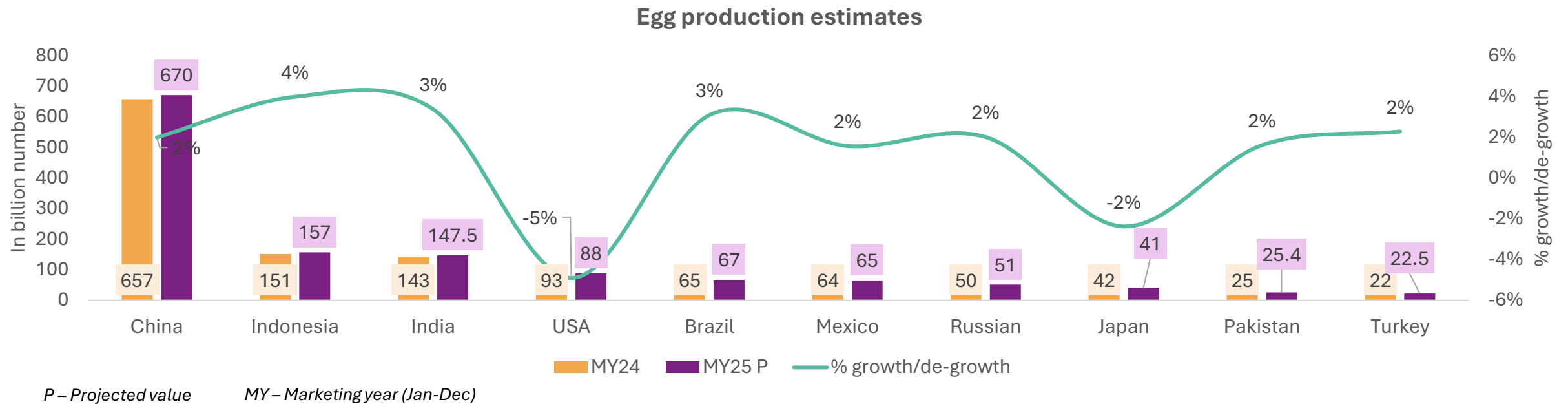
October-2025





# **Egg production estimates**

# Egg production estimates

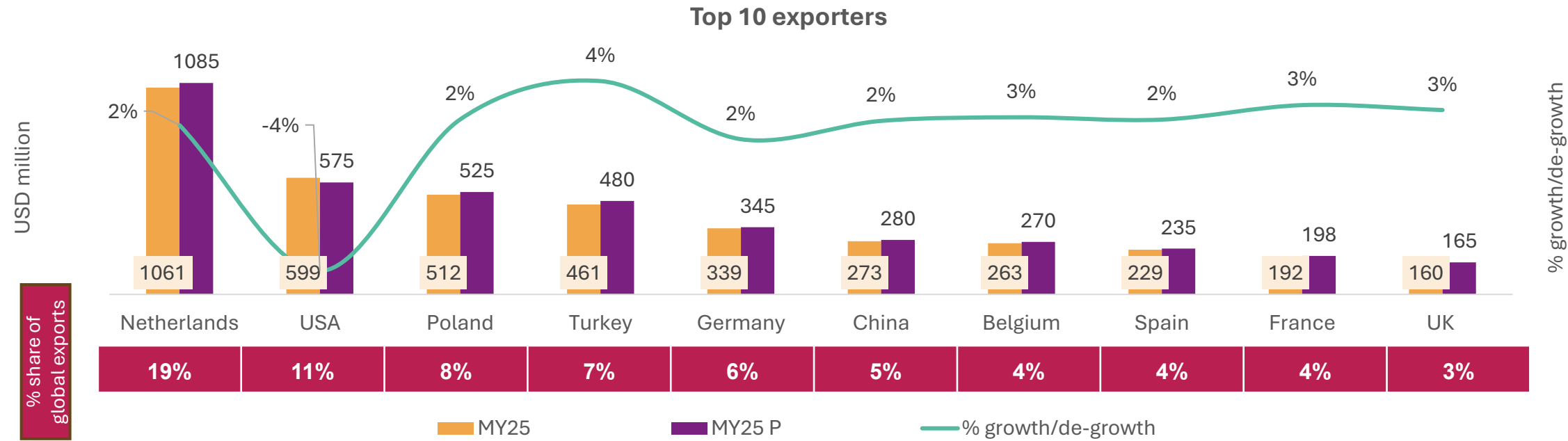


- **Japan's egg production** is anticipated to drop by 1-2% due to the dual challenges of high feed costs and aging infrastructure.
- **India is experiencing a surge in egg production**, driven by government initiatives and private investments in large-scale layer units, which is being fueled by the growing demand from school nutrition programs.
- Turkey's egg production is projected to rise by 2%, supported by increased export demand, especially to the US, because of avian influenza outbreaks causing supply shortages in major markets.
- **China is expected to maintain its dominance in the global egg market** with a predicted 1-2% growth rate, although average export prices have declined by 17% due to overcapacity.
- **Mexico is solidifying its position as a key egg supplier in the North American market**, particularly to the US, driven by strong domestic demand, improved farm efficiency, and enhanced disease control measures.
- **Indonesia has emerged as a significant egg exporter**, with plans to export 1.6 million eggs per month to the US to alleviate avian flu-related shortages, while also supplying eggs to Singapore and the UAE, thereby balancing domestic oversupply and supporting global market stability.



# **Export trends and price outlook**

# Major exporters of Eggs



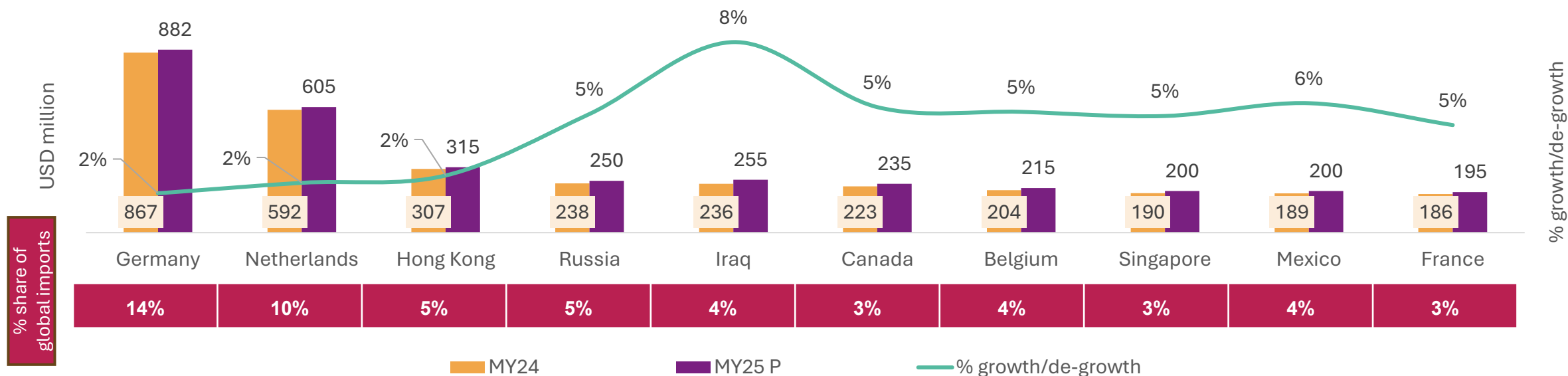
- The countries in the chart **account for around 70% of global egg exports**, with **overall exports projected to increase by 2-3%** in MY25P, driven by increased imports from Turkey, EU, China, and UK.
- **China's egg exports are expected to rise by 2%** due to expanded production capacity, climate-adaptive technology, and stable biosecurity controls, driven by growing global demand for processed egg products.
- Belgium's egg exports are projected to increase by 3% due to robust demand from neighboring Western European countries like Netherlands, France, and Germany, combined with Belgium's efficient cross-border logistics and strong reputation for quality and disease-free production.
- **Turkey's egg exports**, which include high-quality shell eggs and pasteurized liquid eggs, **are expected to grow**, driven by compliance with strict international safety and quality standards, including certifications such as HACCP, ISO 22000, and halal certification, ensuring product safety and market acceptance.

Source: ITC trade map ; HS code 0407



# Major Importers of Eggs

Top 10 Importers



- The countries in the chart **account for around 55% of global egg imports**, with **overall imports projected to increase by 4-5%** in MY25P, driven by increased imports from Iraq, Russia, Canada, and Mexico.
- Mexico's egg imports are expected to rise by 6%**, with a diversification strategy to ensure steady availability and price stability, sourcing from Brazil, France, and the US.
- Iraq's** domestic egg industry is volatile due to disease outbreaks, feed constraints, and supply chain disruptions, **leading to high imports** from countries like Turkey, Belgium, and the Netherlands.
- Domestic producers in France's main egg-producing regions such as Brittany, Pays de la Loire, and Nouvelle-Aquitaine are facing production challenges from disease outbreaks and rising input costs, which is driving the increase in imports from Belgium & Netherlands.

# Global trade dynamics

## Vietnam – Import Quotas

- Vietnam announced a specific import tariff quota for poultry eggs in 2025. The government allocated 72,104 dozen eggs as the quota for commercial egg imports during the period from March to December 2025.

### **The quota system is intended to:**

- Support stability in domestic market prices.
- Ensure domestic producers are not adversely affected by imports.
- Meet consumer demand during periods of potential domestic supply shortfall.

## Nigeria – Import restrictions

- Nigeria's import restrictions on eggs and live or dead poultry have directly affected Indian exporters, limiting their access to one of the major African markets. The Nigerian government's protectionist measures aim to safeguard domestic producers, thereby increasing competition for Indian products and contributing to uncertainty in the export market.

## India's export diversification

- India is actively expanding its egg export markets, targeting countries like Gambia, Nigeria, and the USA, where it is achieving higher realizations.

## Trade challenges for Indian exports

The UK-India Free Trade Agreement (FTA) signed in 2025 notably retained tariffs on poultry and egg imports from India to protect British farmers and maintain high animal welfare standards. Despite liberalizing tariffs on many products, chicken, eggs, pork, and sugar were excluded from tariff reductions. This decision came after strong lobbying from the UK's National Farmers' Union (NFU), which was concerned about competition from lower-priced Indian imports that might be produced under less stringent animal welfare conditions.

India still permits the use of barren battery cages for laying hens, a farming practice banned in the UK since 2012 raising welfare concerns.

## Oman – Import restrictions

- Oman's decision to stop issuing new import permits for Indian table eggs has dealt a significant blow to the poultry industry in Namakkal, Tamil Nadu. The ban was primarily imposed due to biosecurity concerns, including fears of avian influenza, following bird flu outbreaks in India.

# Opportunities for India in Table Egg Exports

## India's opportunity in egg exports to US

- A severe avian influenza outbreak in the U.S. has led to culling of over 14 million hens in 2024–25, pushing egg prices up to \$2.40/dozen.
- To bridge this gap, the U.S. opened to imports beyond its usual suppliers. India exported eggs to the U.S. for the first time in March 2025 (≈3 million eggs).  
**With lower production costs and surplus capacity (~148 billion eggs/year),** India can competitively supply the U.S. market. Anticipating positive feedback from consumers, **exports is expected to scale upto 50–100 containers/month**, making the U.S. a high-value growth market for Indian eggs.

## New opportunities to boost Indian egg exports

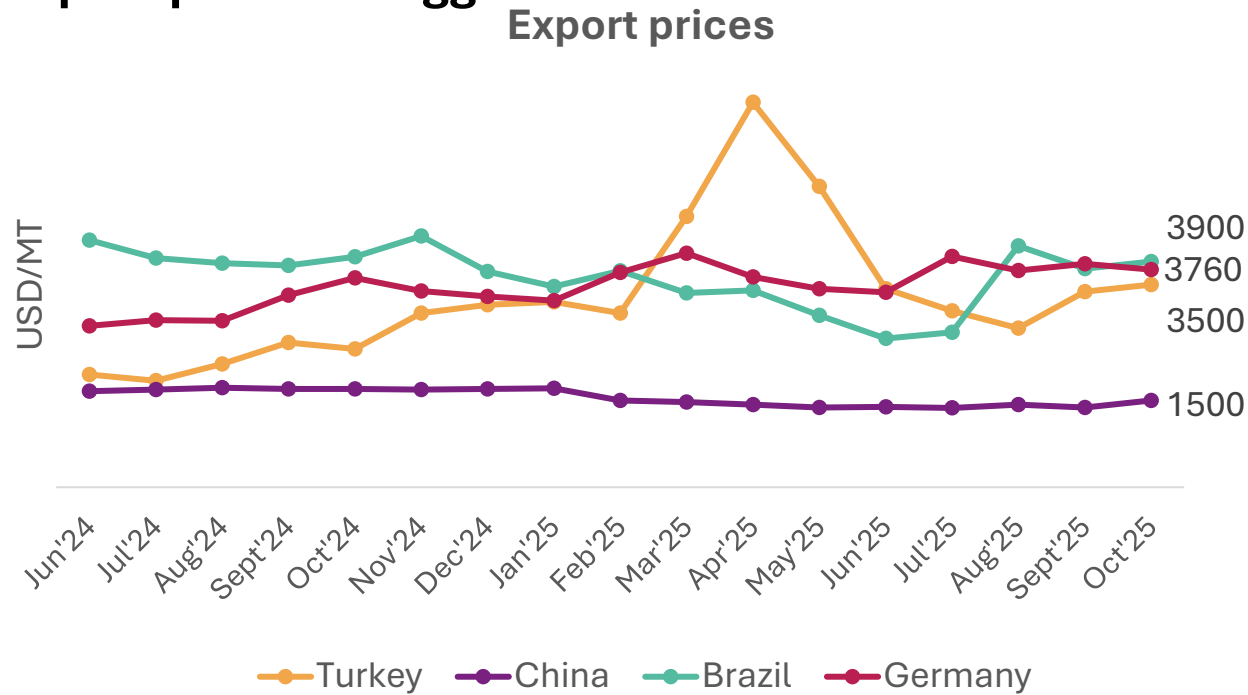
- **Several African nations are witnessing growth in demand** for eggs and poultry products. For instance, between MY20 and MY24, imports have grown at a CAGR of 14% in Ivory Coast, 13% in Senegal, and 57% in Uganda, with Nigeria seeing a 63% increase. South Africa has also recorded a 150% growth.
- Despite their relatively small market size compared to traditional markets, these countries offer substantial emerging opportunities for Indian exporters. The growing demand for affordable protein sources, such as eggs, is being driven by rapid urbanization, increasing population, and rising disposable incomes in these regions.
- India, with egg prices as low as \$ 0.08/Kg compared to the much higher import prices in African markets ( \$8.3/kg from Belgium, \$4.59/kg from Brazil, and \$2.7/kg from Turkey), holds a strong cost advantage and can position itself as a highly competitive supplier of eggs to African countries.

## India's opportunity in egg exports to Gambia

- **India is well-positioned to increase its egg exports to Gambia**, leveraging its competitive pricing and reliable supply capabilities. With Indian eggs **priced at \$600 per ton, compared to Turkey's \$670 per ton**, Indian exporters can capitalize on the price advantage to expand their market share in Gambia.
- As Gambia relies heavily on imports to meet its egg demand, Indian suppliers can establish themselves as a cost-effective alternative to Turkish exports. India's production capacity and ability to scale up volumes quickly provide an opportunity to build long-term trade relationships and strengthen its presence in the West African market.



Export prices of Eggs



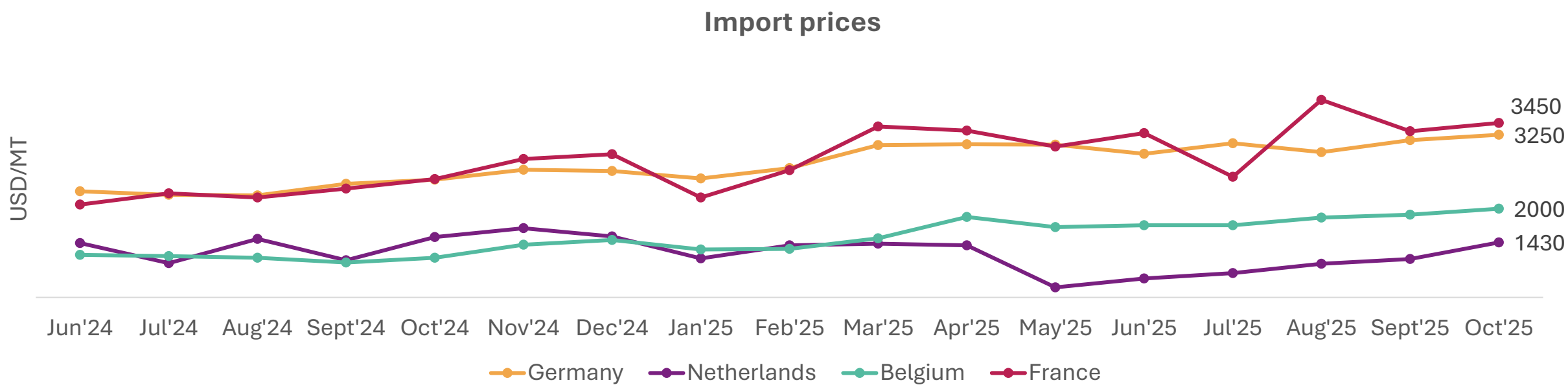
Price outlook for next quarter (NDJ)					
Countries	Oct'25 Price (USD/MT)	Oct'24 Price (USD/MT)	%age change	Price direction	Average price range for NDJ (USD/MT)
Turkey	3500	2390	46%	Bullish	3500-3700
China	1500	1700	-12%	Bullish	1520-1600
Brazil	3900	3980	-2%	Bullish	3950-4200
Germany	3760	3617	4%	Bearish	3500-3750

- **Global egg export prices in early 2025 were driven by supply shocks** and seasonal demand, leading to record highs from Turkey and Germany, while China maintained a competitive edge and Brazil sustained premium exports.
- **By mid-2025, prices eased but remained higher than 2024**, indicating strong demand and ongoing premiumization. This trend is expected to continue, with prices staying structurally higher.
- **Germany's egg export prices are high** due to strong domestic demand and strict EU regulations. However, the price outlook is bearish, with easing supply chain pressures and moderated demand growth expected to stabilize the market.
- China’s massive layer population (over 1.6 billion layers, FAO 2024) ensures a consistent surplus. Exports are dominated by processed/powdered eggs, with lower logistics sensitivity than shell eggs. Despite sporadic AI cases, regionalized controls and strong biosecurity kept output steady.
- **Brazil's egg exports target premium markets with high-value products** like powdered eggs and egg yolk, commanding higher prices due to their long shelf life and industrial applications. This strategy allows Brazil to maintain a strong presence in high-end markets.

Source: ITC trade map, Crisil Intelligence

Note: Price forecasting is based on the fundamental analysis. **NDJ stand for November and December and January.**

# Import prices of Eggs



- **EU egg import prices surged in late 2024 and early 2025**, peaking in March-April due to tight supply and strong demand. Prices eased slightly by mid-2025, remaining above the previous year's levels, indicating robust demand.
- **Germany is the EU's largest egg importer**, driven by high consumption and strong demand from the food industry. Prices peaked above USD 3,000/MT in March-April 2025, driven by reliance on imports during production gaps.
- The Netherlands remains a key egg re-export hub in Europe, backed by strong production and an efficient trading network. Since mid-2024, imports of specialty eggs (organic, free-range, cage-free) have increased, driven by EU animal welfare directives and changing consumer demand in Germany and the Nordic region, with temporary port logistics issues causing brief price spikes.
- **Belgium and France import industrial-grade eggs at lower price points**, supplementing domestic production. Demand is driven by export-oriented processors, with import prices focused on cost-effective bulk supply, supporting the chocolate and bakery industries.

Source: ITC trade map, Crisil Intelligence

**Thank You**


# Methodology for Price Forecasting

Our methodology combines comprehensive secondary research, targeted stakeholder consultations, and rigorous analytical techniques to ensure accuracy and actionable insights. The methodology comprises three key stages: Data Collection, Data Analysis & Interpretation, and Price Forecasting.

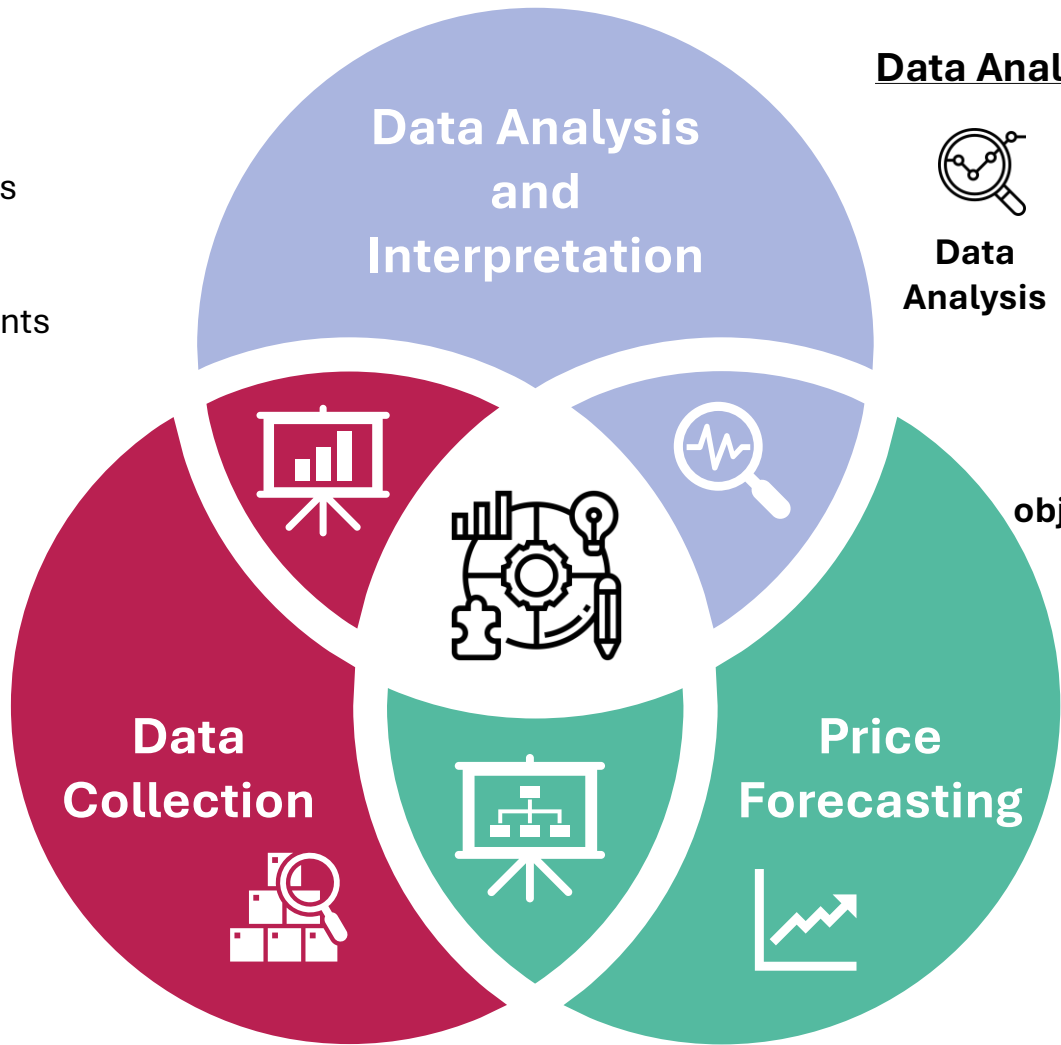
## Data Collection

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**Sources**
- Global agricultural databases (USDA, FAO, etc.)
  - Country-wise statistics from official agriculture departments
  - Industry publications and research reports

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**Policy Updates**
- Detailed review of Production policies & trade barriers for each country
  - Data from government websites & official publications



## Data Analysis and Interpretation

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**Data Analysis**
- Supply-demand assessment
  - Policy impact analysis
  - Stakeholder consultations

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**Key objectives**
- Production trends
  - Trade dynamics
  - Policy implications

## Price Forecasting

- Historical Trend & Seasonality
  - Macro-Economic & Trade Variables
- Integration of commodity fundamentals to forecast future price ranges.

*Structured consultations with Indian exporters and industry associations, cross-verifying secondary data and validating price forecasts to refine production, trade, and policy assessments.*