

Monthly dashboard – Eggs

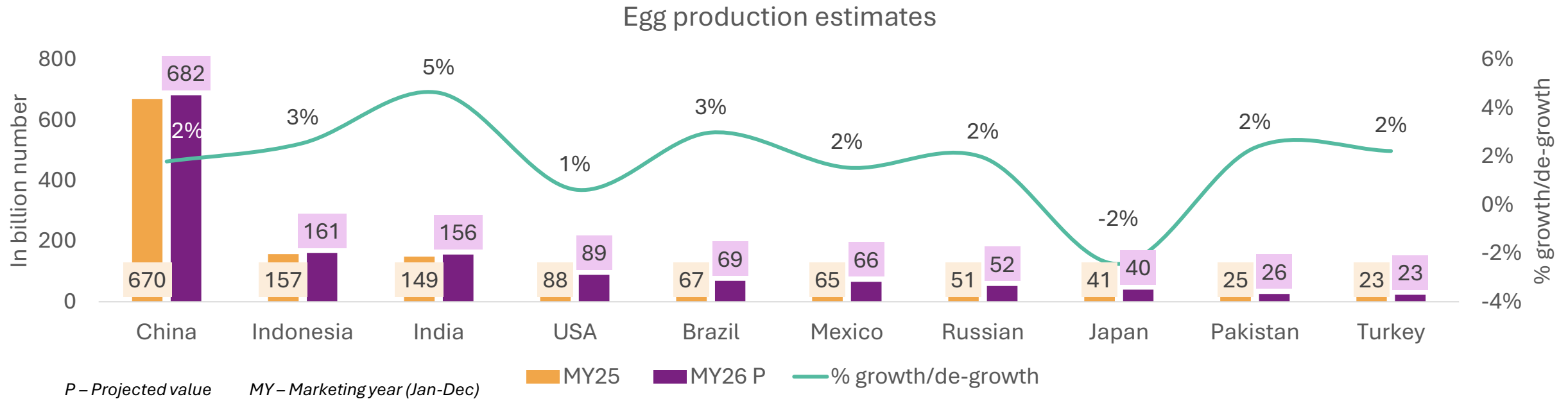
Jan-2026





Egg production estimates

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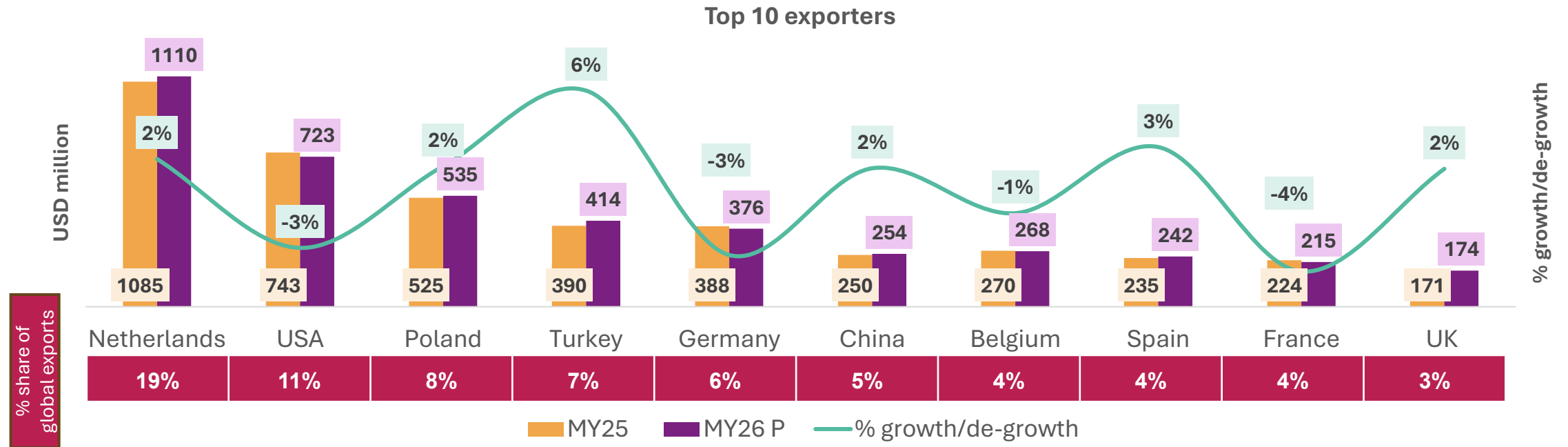


- **Japan's egg production** is anticipated to drop by 2-3% due to the dual challenges of high feed costs and aging infrastructure.
- **India is experiencing a surge in egg production**, driven by government initiatives and private investments in large-scale layer units, which is being fueled by the growing demand from school nutrition programs.
- **Brazil's** egg production is projected to increase by 3% with low-cost corn/soy feed and increasing domestic consumption. The Brazilian Association of Animal Protein (ABPA) notes new investments in cage-free and enriched housing systems that also improve productivity.
- **China is expected to maintain its dominance in the global egg market** with a predicted 2-3% 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.
- USA is expected to see modest egg production growth supported by stabilization after avian flu disruptions and strong regional demand across the Midwest and Southeast, with increasing production of organic and specialty eggs such as omega-3 and pasture-raised varieties.



Export trends and price outlook

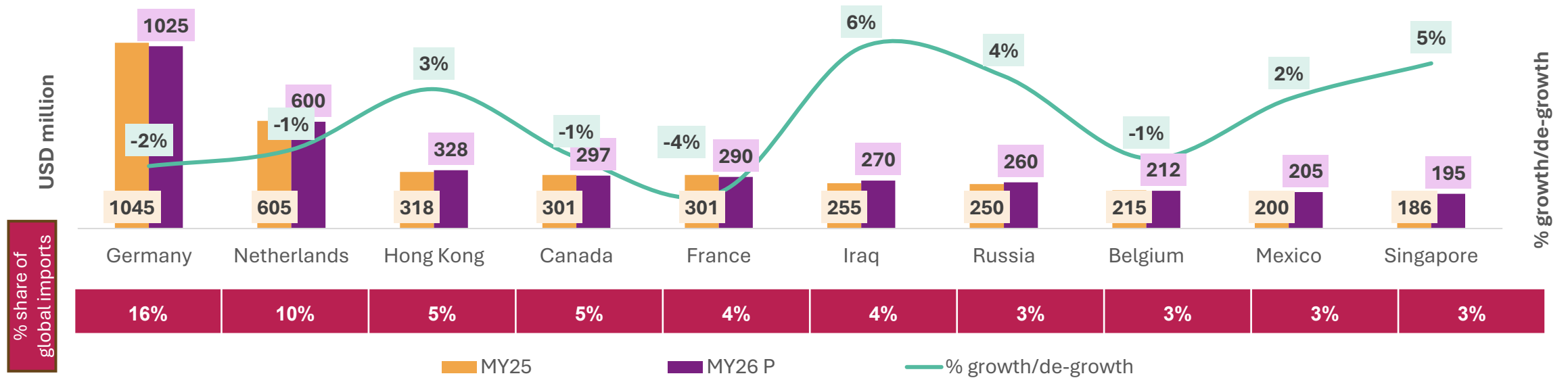
Major exporters of Eggs



- The countries in the chart **account for around 71% of global egg exports**, with **overall exports projected to increase by 3-4% in MY26P**, driven by increased imports from Mexico, Iraq, and Russia.
- Poland’s egg exports are projected to increase by around 2% in MY26, supported by strong regional demand across Central and Eastern Europe, particularly from Germany and neighboring EU countries, where Poland remains a cost-competitive supplier of shell and processed eggs.
- From 2026, Turkey’s egg exports will move through a **new sea-based cold chain corridor to the Middle East and USA**, starting at ~6.7 million eggs per month and scalable to ~450 million annually, with the UAE remaining a key market.
- Germany’s egg exports are projected to decline by around 3% in MY26, primarily due to tightening domestic supply following stricter animal welfare and cage-free production regulations, which have increased production costs and limited output expansion.

Major Importers of Eggs

Top 10 Importers



- The countries in the chart **account for around 56% of global egg imports**, with **overall imports projected to increase by 5-6%** in MY26P, driven by increased imports from Hong Kong, Iraq, Russia, Singapore and Mexico.
- **Mexico's egg imports are expected to rise by 2% in MY26**, with a diversification strategy to ensure steady availability and price stability, sourcing from Brazil, France, and the US.
- Bird flu in the Netherlands' Noord-Limburg region is restricting egg exports to Germany's Ruhr area due to EU regulations, forcing buyers to source from alternative origins and causing regional supply disruptions.
- Russia's egg imports are projected to grow by about 4% in MY26, driven by regional supply gaps in parts of Central and Far Eastern Russia, with imports primarily sourced from Belarus, Turkey, and Kazakhstan to stabilize domestic availability.

Global trade dynamics

India's opportunity in egg exports to Guinea

- Guinea's egg import demand is steadily increasing, driven by rapid population growth, urbanization, and limited domestic poultry production, creating opportunities for competitively priced egg imports.
- India can leverage its cost competitiveness and large-scale production to supply shell eggs and processed egg products to Guinea at prices lower than European suppliers, supporting consistent and affordable supply.
- Urban demand in Conakry and other major cities is expanding, particularly from bakeries, food service outlets, and institutional buyers, where eggs remain an affordable protein source with stable consumption growth.
- With regular container shipments and partnerships with West African distributors, India can build a sustainable export channel to Guinea.

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.

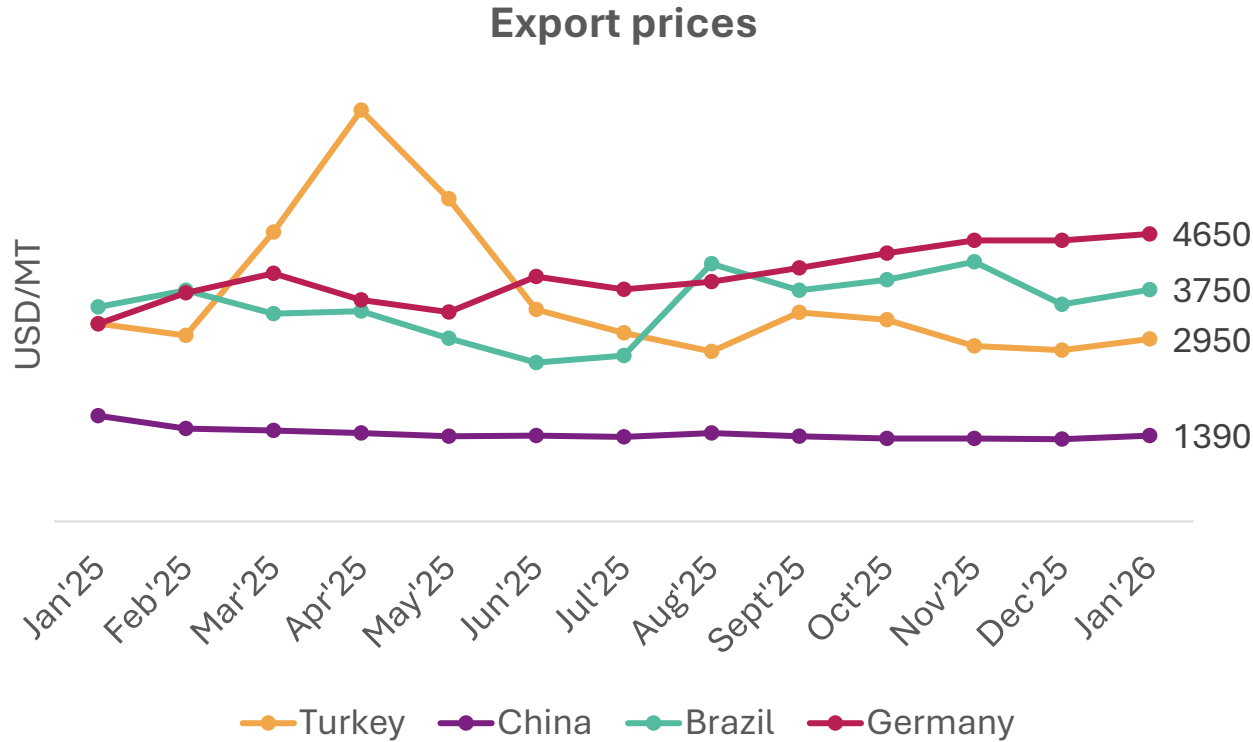
Trade challenges for Indian exports

Hong Kong's Centre for Food Safety (CFS) continues to suspend imports of poultry eggs from West Godavari, East Godavari, and Krishna districts in Andhra Pradesh due to ongoing concerns over highly pathogenic H5N1 avian influenza outbreaks reported by WOA. The original suspension was announced on March 28, 2025; recent CFS actions (e.g., February 20, 2026) reaffirm similar suspensions for affected Indian regions amid new outbreaks. CFS monitors WOA updates and maintains protocols selectively, but these districts stay restricted to protect public health. Additional suspensions hit Uttarakhand in December 2025 for similar H5N1 reasons, signaling persistent biosecurity challenges for Indian egg exports to Hong Kong.

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.

Export prices of Eggs



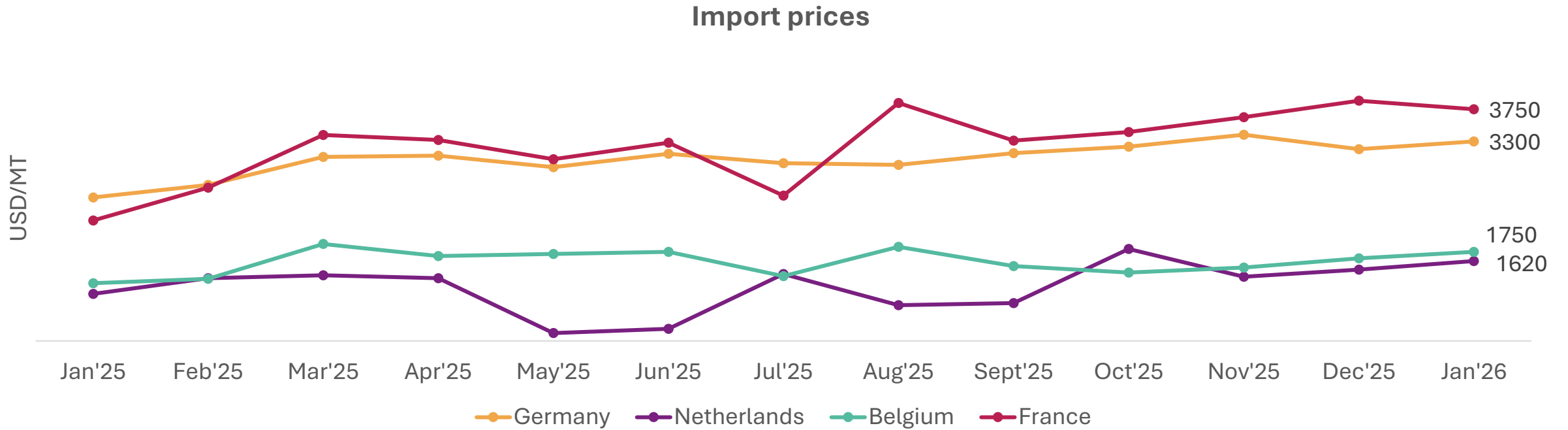
Price outlook for next quarter (FMA)					
Countries	Jan'26 Price (USD/MT)	Jan'25 Price (USD/MT)	%age change	Price direction	Average price range for FMA (USD/MT)
Turkey	2950	3200	-8%	Bullish	3000-3400
China	1390	1710	-19%	Bullish	1400-1550
Brazil	3750	3470	8%	Bullish	3800-4200
Germany	4650	3196	45%	Bullish	4660-4800

- Global egg export prices showed volatility in early 2025, with Turkey and Germany recording strong price increases, particularly around March–April 2025 due to tight supply and seasonal demand. Prices moderated slightly during mid-2025, before strengthening again toward late 2025 and early 2026, indicating continued firm global demand.
- China’s egg export prices are expected to remain bullish, supported by strong demand for processed egg products across East and Southeast Asia, along with stable large-scale domestic production.
- Turkey’s egg export prices are expected to remain bullish, supported by strong regional demand from the Middle East and North Africa, where Turkey continues to be a key and cost-competitive supplier.

Source: Includes findings from primary interactions and estimations & ITC trade map (HSN Code: 0407)

Note: Price forecasting is based on the fundamental analysis. **FMA stand for February, March and April.**

Import prices of Eggs



- EU egg import prices increased in early 2025, with prices rising from January and peaking around March–April 2025 across most countries due to tighter supply conditions. Prices softened slightly during May–July 2025, especially in France, before recovering again toward late 2025 and early 2026, remaining above early-2025 levels, indicating steady demand.
- Germany’s egg import prices remained relatively stable, fluctuating within a narrow band of USD 3,000–3,300/MT through 2025. Prices showed a mild upward trend toward late 2025 and early 2026, reflecting consistent demand from food processing industries and reliance on intra-EU trade.
- The Netherlands showed the highest volatility, with prices falling sharply around May–June 2025 to nearly USD 600–700/MT, followed by a recovery to about USD 1,600–1,700/MT by early 2026. This reflects its role as a trading and redistribution hub, where prices respond quickly to supply adjustments.

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



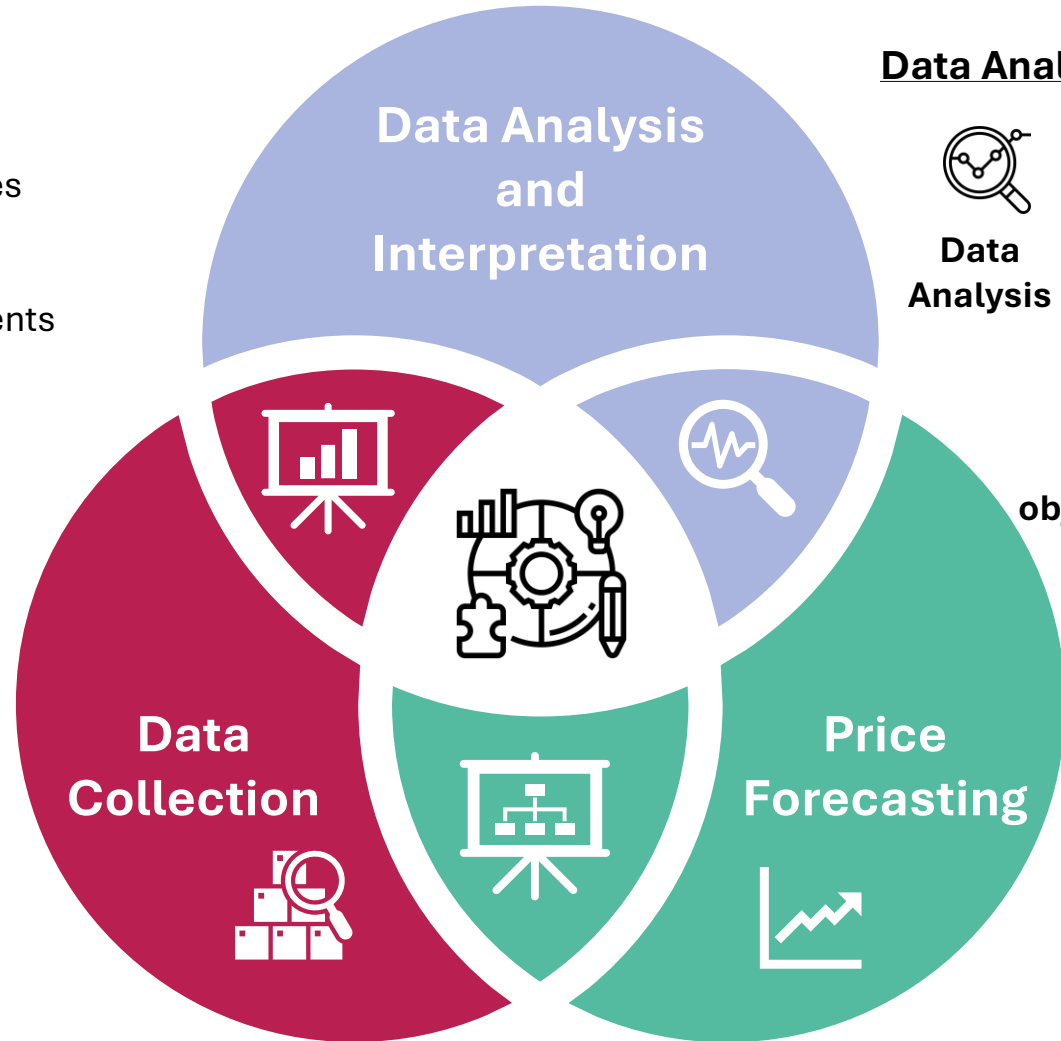
Sources

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



Policy Updates

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



Data Analysis and Interpretation



Data Analysis

- Supply-demand assessment
- Policy impact analysis
- Stakeholder consultations



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.