

# July

## Monthly dashboard - Eggs



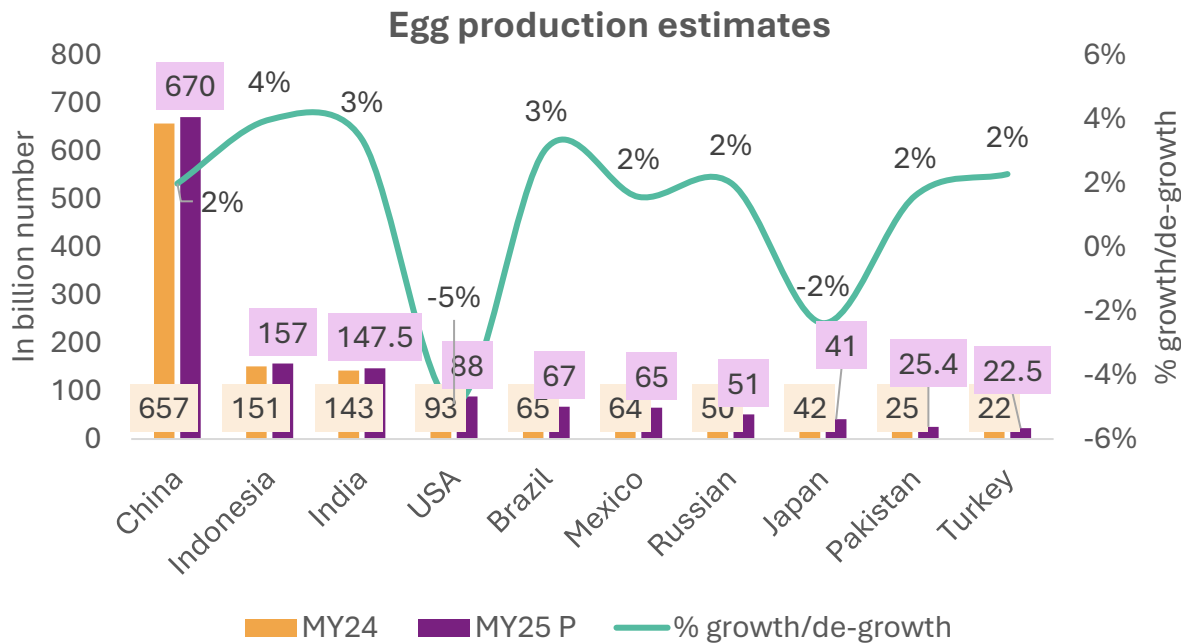




# **Egg production estimates**



# Egg production estimates



P – Projected value      MY – Marketing year (Jan-Dec)

- **China** leads global egg production, with 1-2% growth expected in MY25. However, strong profits and favorable feed costs attracted new players, resulting in excess production capacity. This surplus has caused average export prices to drop 17% year-over-year as of July 2025.
- **Indonesia:** Surplus egg production has enabled the country to become a notable exporter, with plans to ship 1.6 million eggs monthly to the US to address avian flu-related shortages.
- **India:** The country's egg production continues to rise, driven by government support and private investment in large-scale layer units, as well as growing demand from school nutrition programs.
- **USA:** Egg production has contracted due to avian influenza outbreaks, leading to increased imports, which have risen tenfold to 26 million eggs (Jan-Jun '25). The majority of these imports (57%) come from Turkey.

- **Brazil's** egg sector is expanding steadily 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.
- **Mexican** egg production is fueled by robust domestic demand, investment in farm efficiency, improved animal husbandry, and disease control are contributing to output increases, maintaining Mexico's role as a key supplier to the US market.
- **Russia's** poultry sector faces challenges from global feed cost increases, but government support and local production capacity help maintain growth.
- **Japan** production is expected to decline marginally by 1-2%, attributed to high feed costs (import-dependent) and aging layer infrastructure, along with disease risks of avian influenza.
- **Pakistan's** production in MY25 is expected to grow modest (1-2%), likely reflecting ongoing improvements in poultry infrastructure and gradually rising domestic demand.
- **Turkey's** egg production continues to grow steadily. Although there was a brief drop in late 2024 due to avian influenza outbreaks, production recovered quickly in early 2025. Exports to the US increased sharply, but regional exports faced challenges as neighboring countries like Russia and Iran imposed restrictions after the 2024 outbreak.

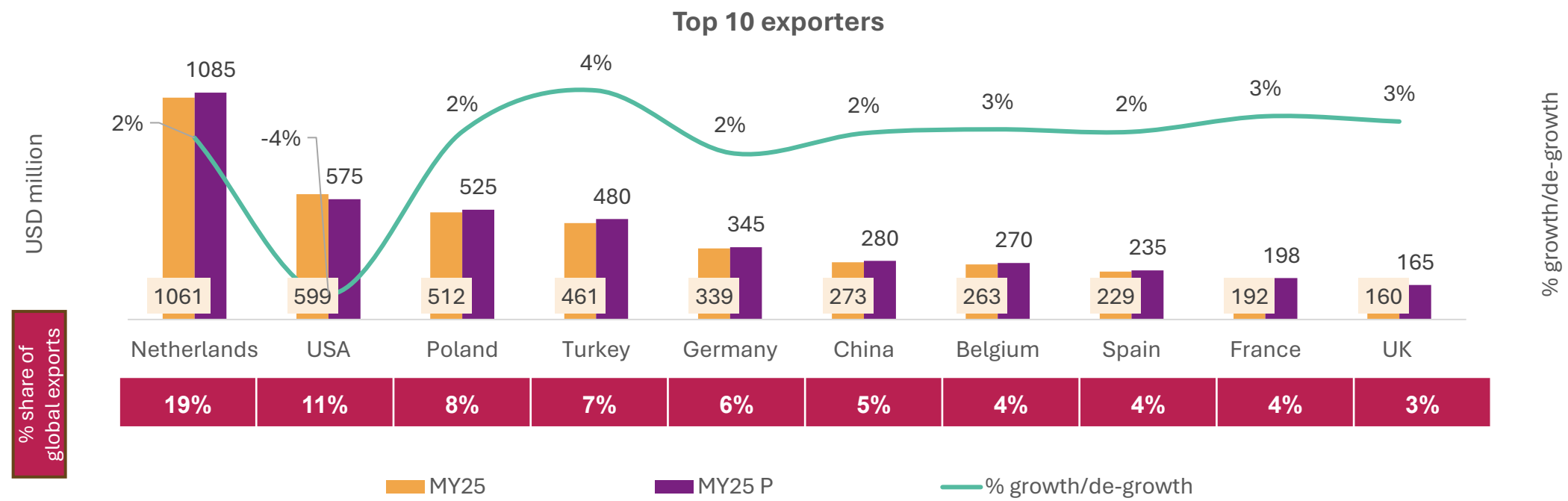




# **Export trends and price outlook**



# Major exporters of Eggs

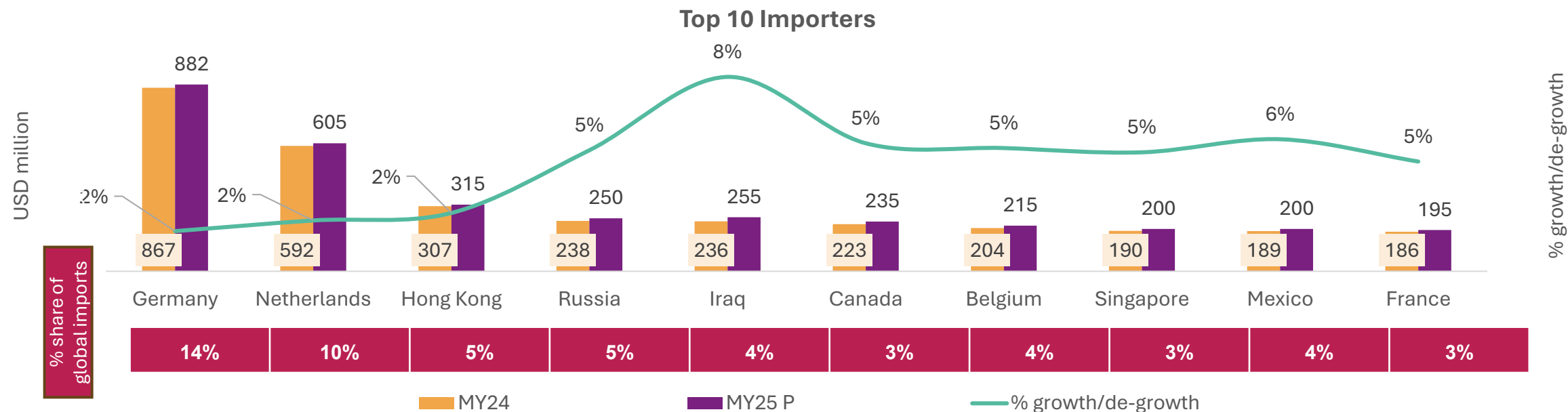


- The countries shown in the chart **account for around 70% of total global egg exports**. Overall exports for MY25 are projected to increase by ~2-3% year-on-year, primarily due to increased imports of Turkey, EU, China and UK.
- **EU egg exports are expected to grow by around 2–3% in 2025**, driven by strong intra-EU demand. **Investments in breaking and pasteurizing plants, plus the ongoing cage-free transition, support higher-value exports to both EU and external markets** (Middle East, North Africa, Asia).
- **Germany: Egg exports are expected to rise by 2% due to a 4-5% increase in domestic production in 2024**, driven by strong demand from neighboring countries for high-quality, cage-free eggs.
- **USA:** The layer industry has been impacted by repeated **HPAI outbreaks, affecting over 123 million birds since 2022**. This has led to reduced domestic output, tightened supply, and higher prices, resulting in decreased exports.

Source: ITC trade map ; HS code 0407, [Germany: Egg production increased by 4.2 percent in 2024 - Euromeatnews.com](#)



# Major Importers of Eggs



- The countries **shown in the chart account for around 55% of total global egg imports**. Overall Imports are projected to increase by **4-5% year-on-year in MY25P**, primarily due to increased imports of Iraq, Russia, Canada, Mexico.
- **The EU egg supply has tightened due to new cage-free rules**, while demand from food manufacturers remains strong. As a result, imports are increasing to fill the gap and meet growing demand.
- **Iraq: The domestic egg industry remains volatile** due to disease outbreaks, feed constraints, and supply chain disruptions, leading to high imports. However, there are signs of potential recovery in local production.
- **Singapore: Egg demand is rising steadily** due to population growth, tourism, and a growing food service sector. While imports remain high, the government's "30 by 30" initiative is driving local production, which now accounts for over 34% of domestic consumption.



# Global trade dynamics

## Vietnam – Import Quotas

- Vietnam has 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.

## Kazakhstan – Import restrictions

- Although Kazakhstan accounts for only 1% of global egg imports, it has been growing rapidly at a 13-14% CAGR from MY20-24. To support domestic producers during a period of weak demand, the country has imposed a 6-month ban on fresh egg imports, effective April 9, 2025, covering both EAEU and non-EAEU countries.

## 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.

## Oman – Import restrictions

- Oman's decision to stop issuing new import permits for Indian table eggs has significantly impacted the poultry industry in Namakkal, Tamil Nadu. The ban, driven by biosecurity concerns and fears of avian influenza, was imposed in response to 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 US has led to the culling of over 14 million hens**, resulting in a supply gap and a significant increase in egg prices (up to \$2.40/dozen). To address this shortage, the US has opened up to imports from new suppliers, including India.
- **India has begun exporting eggs to the US**, with an initial shipment of approximately 3 million eggs in March 2025. With lower production costs and surplus capacity (148 billion eggs/year), India is well-positioned to competitively supply the US market.
- As the US market responds positively to Indian eggs, **exports are expected to scale up to 50-100 containers/month, making the US a high-value growth market for Indian eggs.**

## New opportunities to boost Indian egg exports

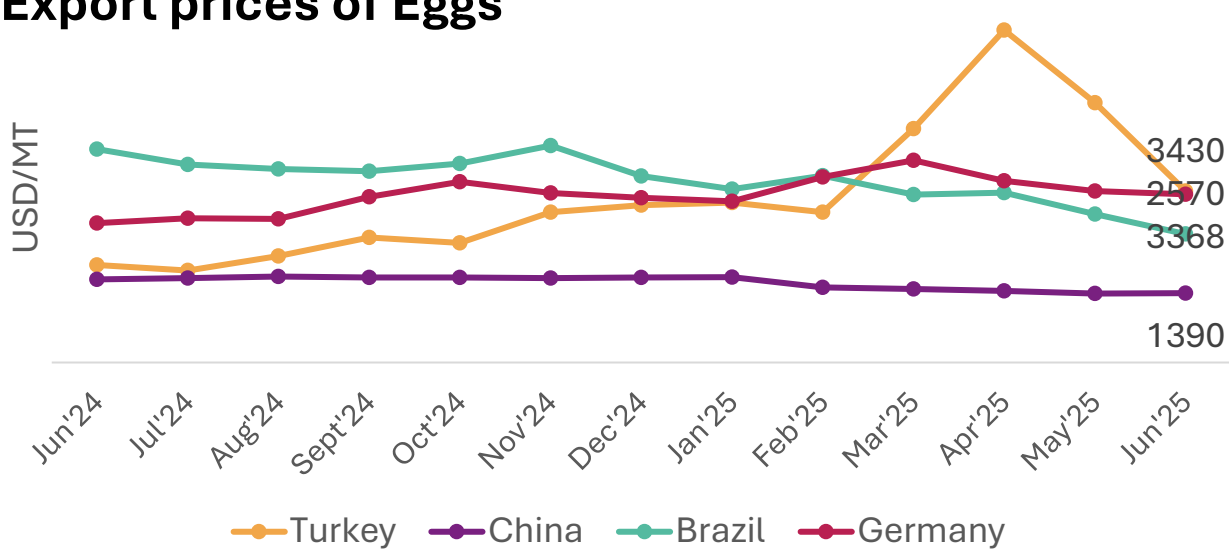
- **Several African nations are witnessing remarkable growth in demand for eggs** and poultry products. For instance, between MY20 and MY24, imports **have grown at a CAGR of 14% in Ivory Coast, 13% in Senegal, 57% in Uganda, and an impressive 63% in Nigeria.** South Africa has also recorded a staggering 150% growth during the same period.
- Although the overall market size in these countries is still relatively small compared to traditional destinations, they present significant emerging opportunities for India's exporters. Rapid urbanization, population growth, and rising disposable incomes are fueling a surge in the consumption of affordable protein sources such as eggs.
- Moreover, **local production in many of these regions remains limited**, and with a strong reliance on food imports to meet domestic demand, these countries **are shaping up to be high-potential, under-served markets that India can actively explore and penetrate.**

## India's opportunity in egg exports to Canada

- Canada's reliance on US egg imports has become challenging due to a decline in US egg production, resulting in tightened supply and higher export prices. This creates an opportunity for India to enter the Canadian market, offering a competitive alternative with:
  - Lower production costs
  - Competitive export prices compared to the US
  - Affordable and consistent supply



## Export prices of Eggs

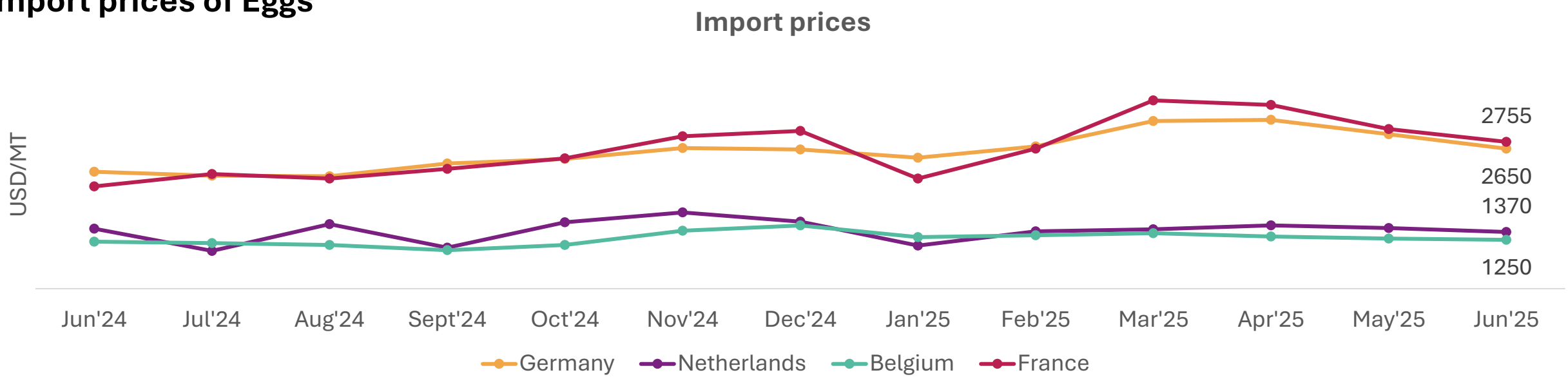


Price outlook for next quarter (ASO)					
Countries	Jul'25 Price (USD/MT)	Jul'24 Price (USD/MT)	%age change	Price direction	Average price range for ASO (USD/MT)
Turkey	4100	1840	123%	Bearish	4000-3900
China	1400	1690	-17%	Sideways	1430-1500
Brazil	3450	3960	-13%	Sideways	3350-3450
Germany	3250	2887	13%	Bearish	2900-3000

- **Global egg export prices in early 2025 were shaped by supply shocks**, including avian influenza and feed costs, as well as seasonal demand, resulting in record highs from Turkey and Germany, while China maintained a cost-competitive floor and Brazil sustained premium processed exports, and by mid-2025, prices eased but remained structurally higher than 2024, signaling a market with strong underlying demand and ongoing premiumization.
- **Turkey's egg exports in early 2025 were driven by high-value shell eggs** and pasteurized liquid eggs, with Middle Eastern buyers stockpiling during Ramadan, causing a price surge. However, avian influenza outbreaks and production pressures led to supply constraints, causing prices to spike and then ease by late 2025.
- China's vast layer population (over 1.6 billion, FAO 2024) maintains a surplus. The country dominates exports of processed and powdered eggs, which are less logistics-sensitive than shell eggs. Regional controls and strong biosecurity have kept output stable despite occasional AI cases, while competition from India and Southeast Asia has kept prices in check.
- **Brazil's egg exports focus on high-value products like powdered eggs, egg yolk, and albumin**, which command premium prices due to their long shelf life and industrial applications. Exporters target lucrative markets like Japan, the EU, and the Middle East, where they achieve higher returns.



# Import prices of Eggs



- **Germany is the largest egg importer in the EU**, driven by high consumption (eggs per capita > 240 annually). Prices traded above USD 3,000/MT in Mar–Apr 2025, driven by heavy reliance on imports during production gaps and strong demand from bakeries, confectionery, and ready-to-eat segments.
- **The Netherlands remains a key egg re-export hub in Europe**, backed by strong production and a 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 imports are supplementary to a strong domestic production base.** Imports are mainly of liquid egg products and industrial eggs for chocolate and bakery industries. Lower price points reflect bulk industrial-grade eggs rather than premium shell eggs. Demand is stable with mild growth, supported by export-oriented processors.

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.

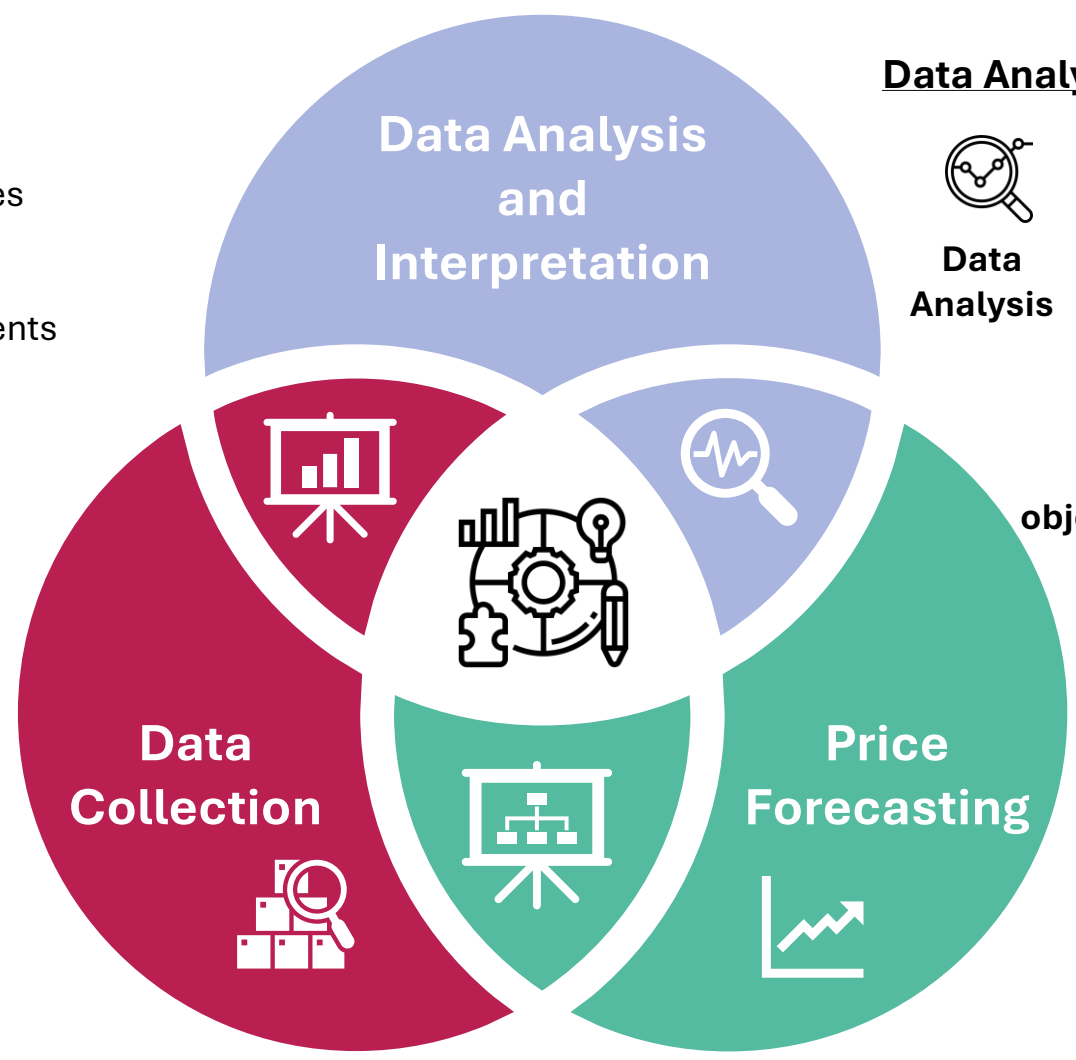
## Data Collection

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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.*