

# Monthly dashboard – Eggs

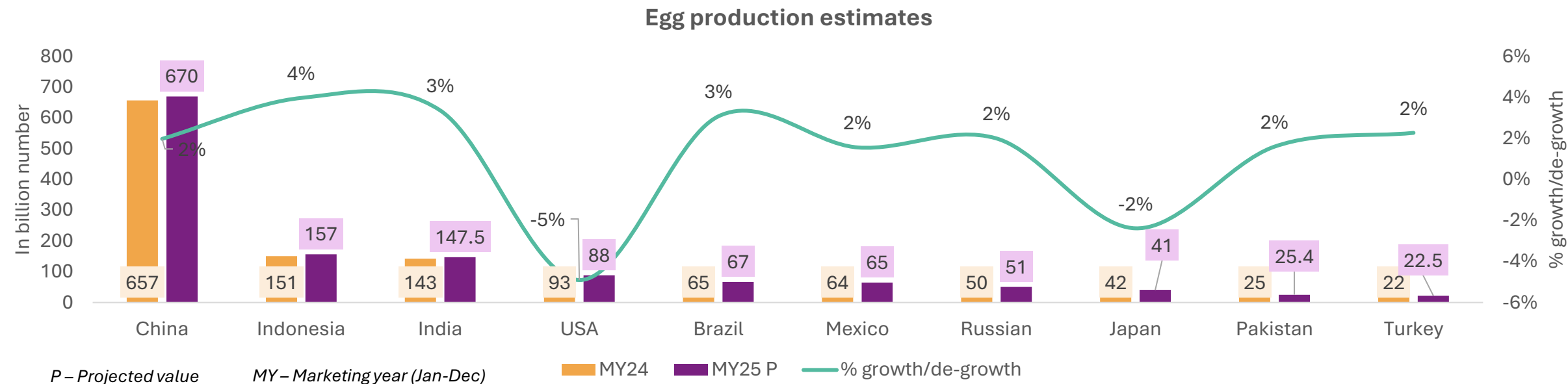
Aug-2025





# **Egg production estimates**

# Egg production estimates

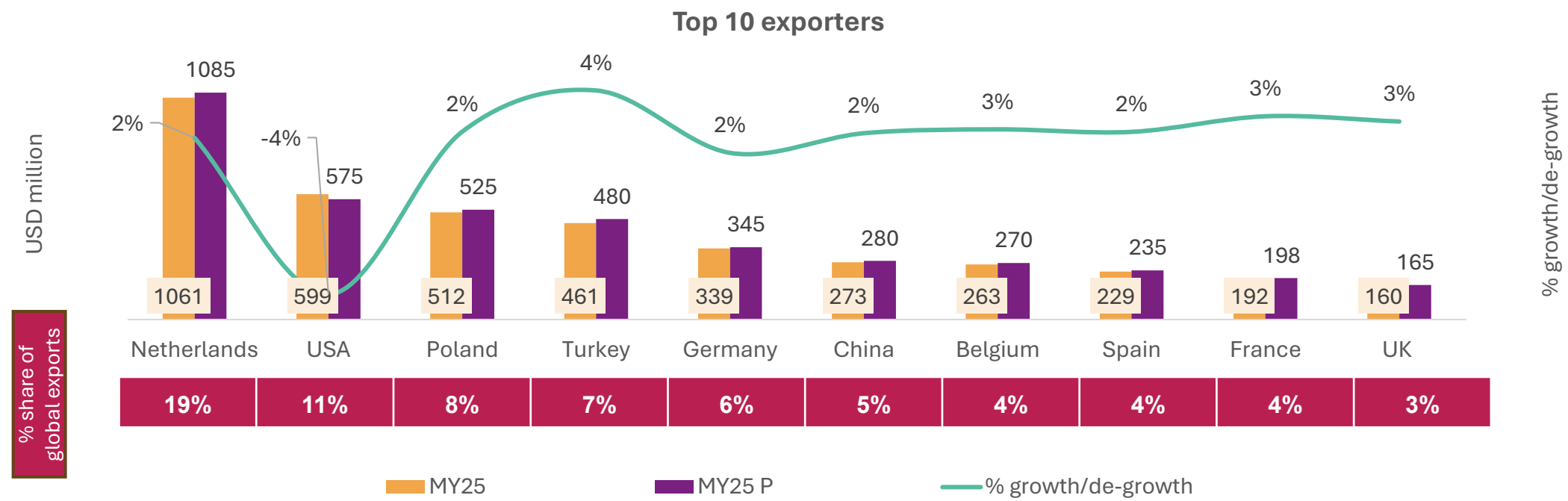


- **Brazil's egg sector is expanding with low-cost feed** and increasing domestic consumption. The Brazilian Association of Animal Protein notes new investments in cage-free systems that improve productivity.
- **Japan's production is expected to decline 1-2%** due to high feed costs and aging infrastructure. India's egg production is rising due to government support and private investment in large-scale layer units, driven by demand from school nutrition programs.
- **US egg production has contracted due to avian influenza outbreaks**, leading to increased imports, mostly from Turkey. China dominates the global egg market with a predicted 1-2% growth rate, but average export prices have plummeted 17% due to excess production capacity.
- **Turkey's egg production has rebounded in 2025**, with exports to the US increasing, but facing challenges in regional markets.



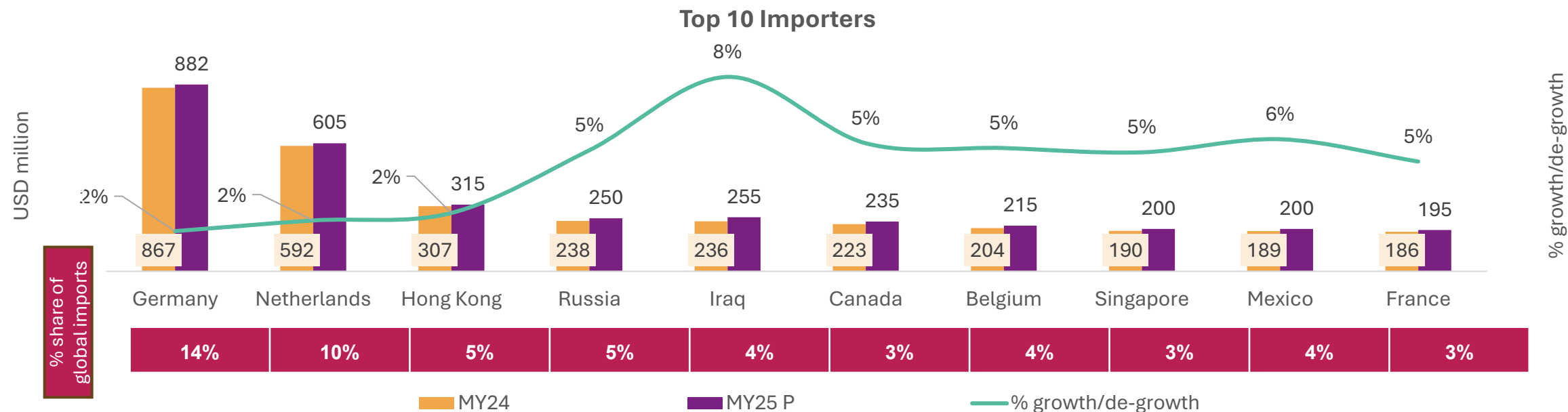
# **Export trends and price outlook**

# Major exporters of Eggs



- **The countries shown in the chart account for around 70% of total global egg exports.** Overall exports for MY25P 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).
- **China's egg export is expected to increase by 2%** due to expanded production capacity, climate-adaptive technology enabling growth in southern provinces like Guangxi and Guangdong, stable biosecurity controls, and rising global demand for processed egg products.
- **France's egg exports are expected to rise by 3 %** due to **strong international demand for organic and traceable eggs**, high animal welfare standards, and efficient EU trade policies that enable premium market access, with particularly robust demand from the Middle East and Asia.

# 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, primarily due to increased imports of Iraq, Russia, Canada, Mexico.
- EU egg supply has become tighter because farms must comply with new, more humane cage-free rules, while demand from food manufacturers stays strong. Imports filling structural gaps to meet the growing demand.
- **Iraq's domestic industry remains volatile**, affected by disease outbreaks, feed constraints, and supply chain disruptions leading to high imports from countries like Turkey, Belgium, and the Netherlands, despite signs of potential local production recovery.
- **Singapore's egg demand is rising steadily due to population growth**, expanding tourism, and a booming food service sector. Despite heavy reliance on imports, recent supply shocks have encouraged diversification of sourcing. Meanwhile, 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 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

- Kazakhstan holds only about a 1% share of global imports but has been growing at a 13–14% CAGR during MY20–MY24. Starting April 9, 2025, the country imposed a six-month ban on fresh egg imports. The measure, aimed at supporting domestic producers during a period of weak seasonal demand, applies to imports from 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.

## Trade challenges for Indian exports

- The temporary ban imposed by South Africa on imports of live poultry, eggs, and poultry meat has significantly impacted India's export market. As a key importer of poultry products, South Africa's ban has resulted in reduced export volumes for India and created challenges in identifying alternative markets.
- In a similar vein, 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.

## 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.

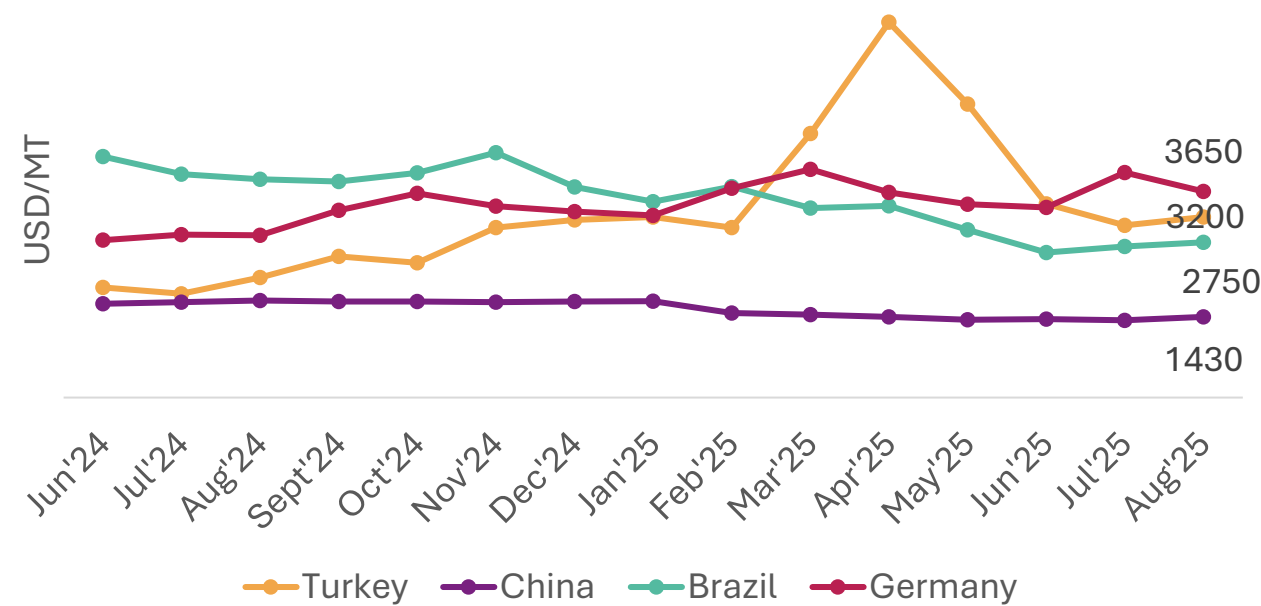
## New opportunities to boost Indian egg exports

- Several African nations are witnessing 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 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 and dependable alternative to Turkish exports. India's robust production capacity and ability to scale up volumes quickly also provide an opportunity to build long-term trade relationships and strengthen its presence in the West African market.

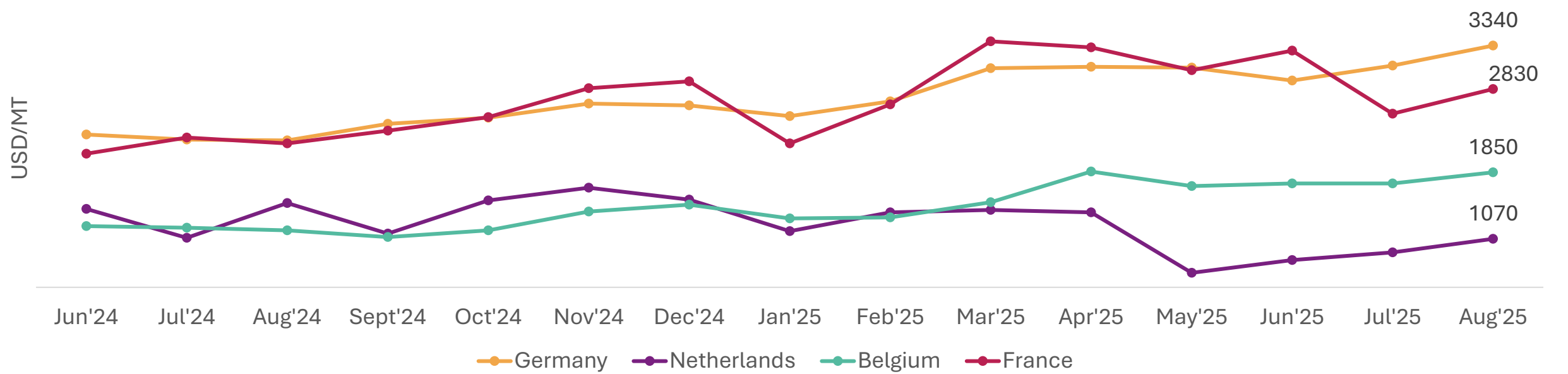
# Export prices of Eggs



| Price outlook for next quarter (SON) |                       |                       |             |                 |                                      |
|--------------------------------------|-----------------------|-----------------------|-------------|-----------------|--------------------------------------|
| Countries                            | Aug'25 Price (USD/MT) | Aug'24 Price (USD/MT) | %age change | Price direction | Average price range for SON (USD/MT) |
| Turkey                               | 3200                  | 2130                  | 50%         | Bullish         | 3500-4000                            |
| China                                | 1430                  | 1720                  | -17%        | Sideways        | 1450-1500                            |
| Brazil                               | 2750                  | 3870                  | -29%        | Bullish         | 2800-2950                            |
| Germany                              | 3650                  | 2874                  | 27%         | Bearish         | 3000-3500                            |

- Global egg export prices in early 2025 were shaped by supply shocks (avian influenza, feed costs) and seasonal demand, causing record highs from Turkey and Germany, while China maintained a cost-competitive floor and Brazil sustained premium processed exports.
- By mid-2025, prices eased but stayed structurally higher than 2024**, signaling a market with strong underlying demand and ongoing premiumization.
- Turkey’s egg exports in early 2025 were driven by a focus on high-value shell eggs and pasteurized liquid eggs**, particularly as Middle Eastern buyers stockpiled during Ramadan in March-April, causing a significant price surge. However, ongoing challenges such as avian influenza (AI) outbreaks and disease-related production pressures led to supply constraints, which combined with fluctuating demand, causing price spike.
- 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 focus on **high-value products like powdered eggs, egg yolk, and albumin, targeting premium markets in Japan, EU, and the Middle East**, where they command higher prices due to their long shelf life and industrial applications.

# Import prices of Eggs



- **EU egg import prices surged through late 2024 into early 2025**, peaking in **March–April** due to **tight supply and strong processing demand**, eased slightly by mid-2025 but **stayed well above the previous year’s levels** indicating robust underlying demand and a shift toward premium-priced imports.
- **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 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 mainly liquid and industrial-grade eggs at lower price points** than premium shell eggs, reflecting bulk industrial use primarily by chocolate and bakery industries. These imports supplement strong domestic production, with stable demand and mild growth driven by export-oriented processors. **Import prices remain competitive, focused on cost-effective bulk supply rather than retail-grade eggs.**

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.

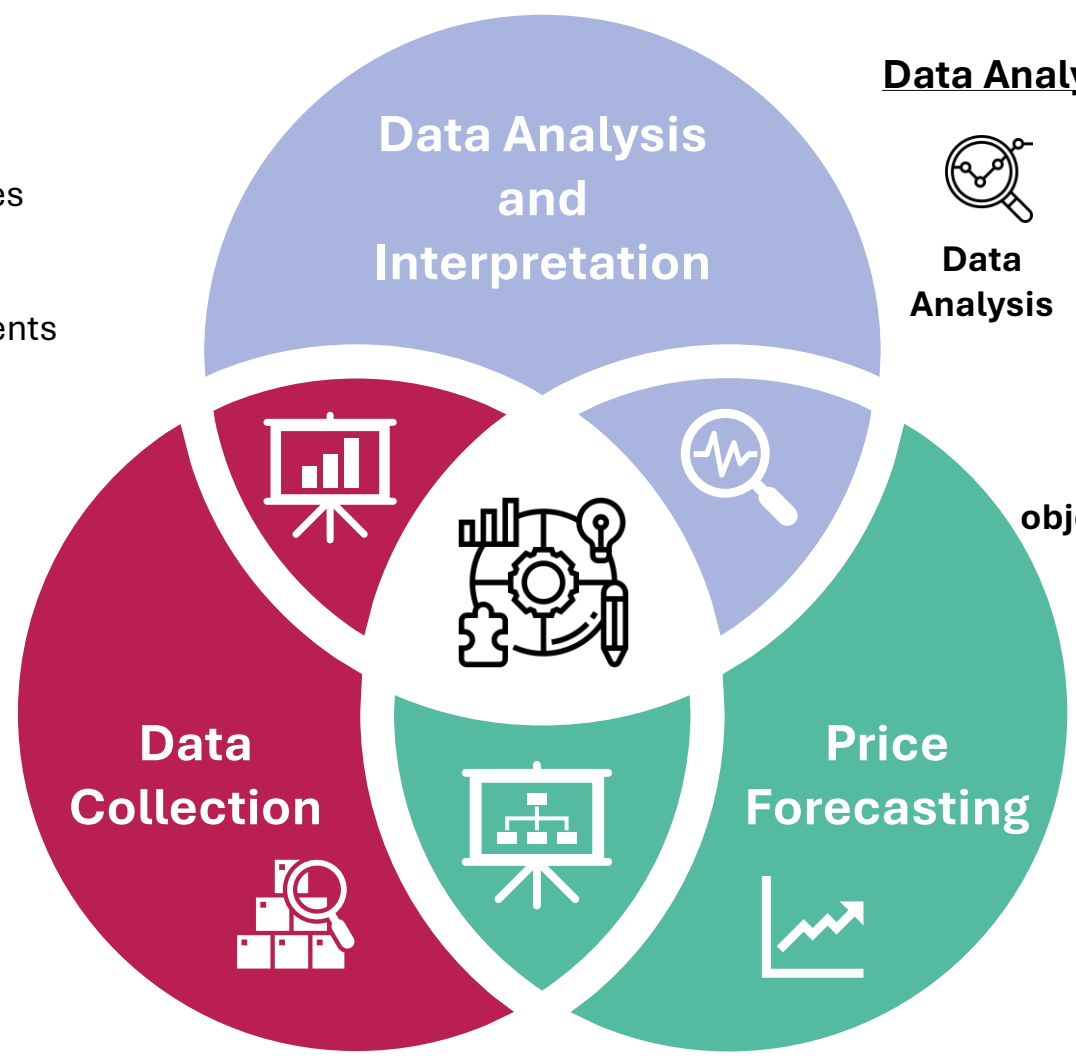
## Data Collection

- 

**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.*