

Monthly dashboard – Eggs

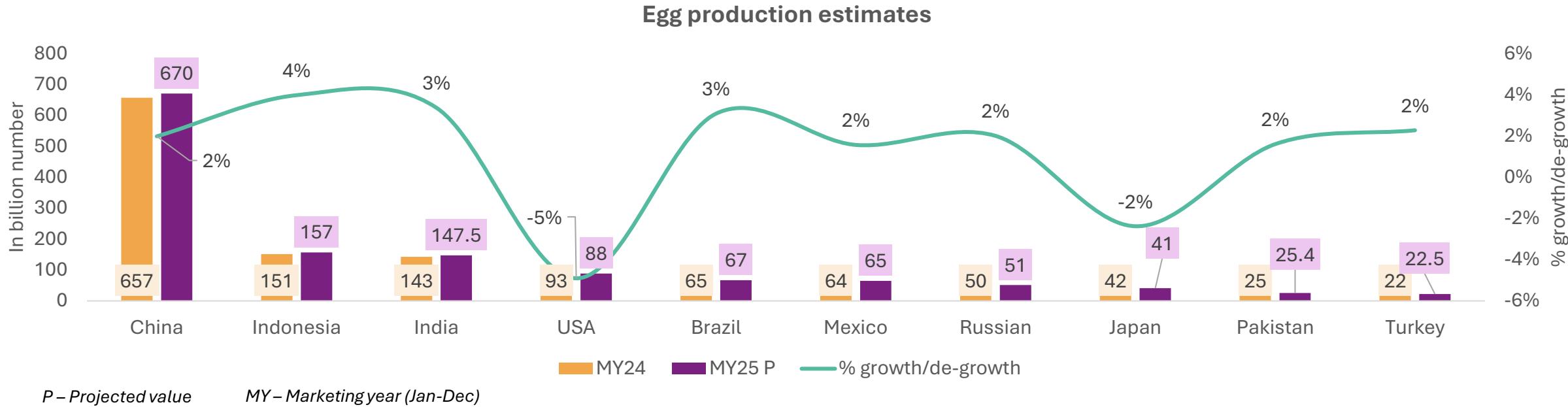
Nov-2025





Egg production estimates

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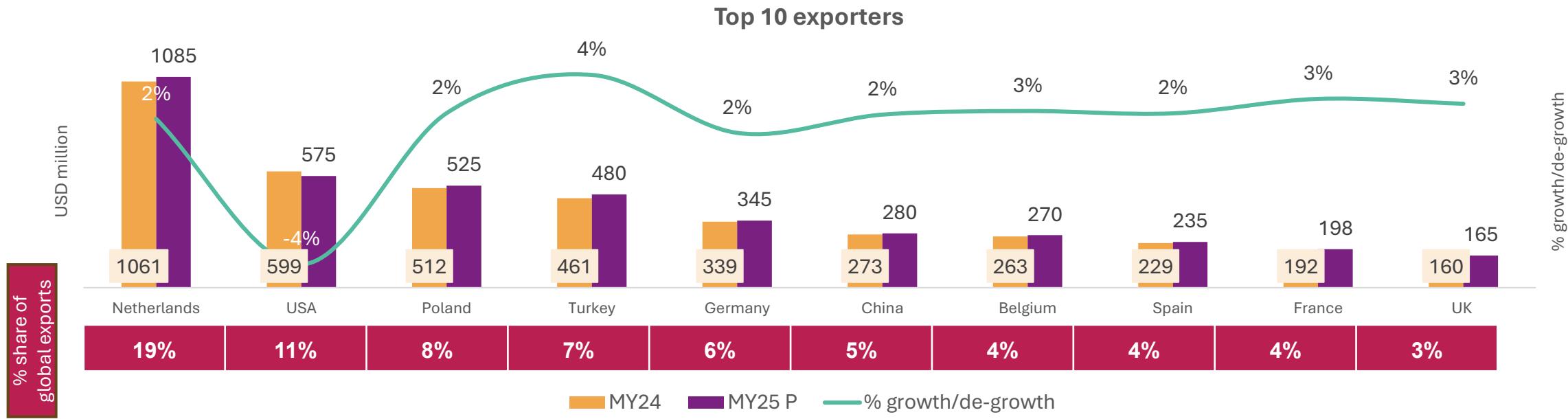


- **Japan's egg production** is anticipated **to drop by 1-2%** due to the dual challenges of high feed costs and aging infrastructure.
- **India is experiencing a surge in egg production**, driven by government initiatives and private investments in large-scale layer units, which is being fueled by the growing demand from school nutrition programs.
- **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 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.



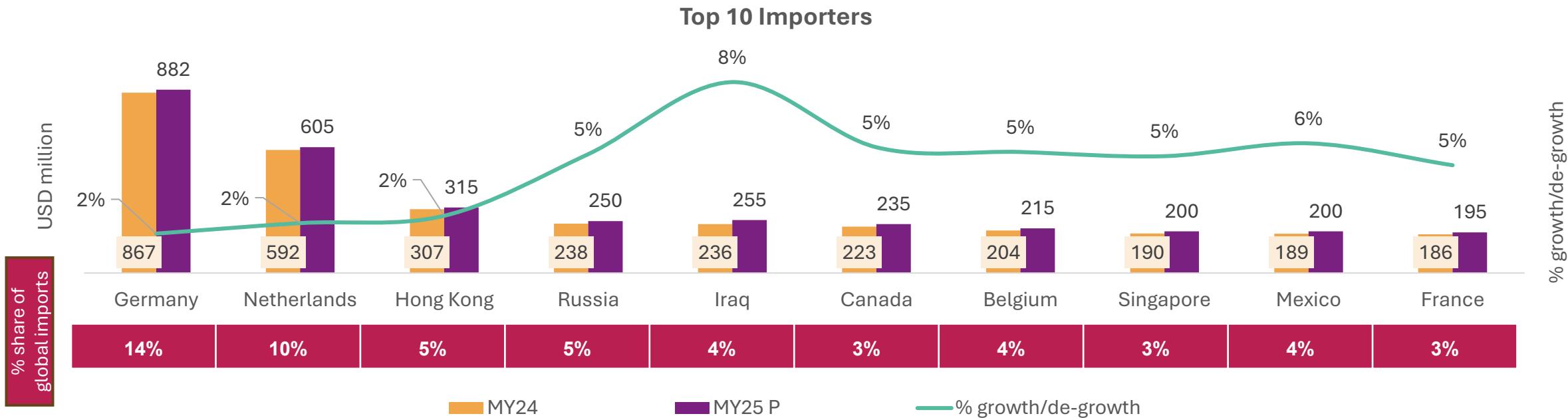
Export trends and price outlook

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 Mexico, France, Iraq, and Russia.
- 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.
- Germany's egg exports are set to increase by 2%, driven by a recovery in domestic supply and strong demand from neighboring countries such as the Netherlands, Belgium, and Switzerland, where consumers increasingly prefer cage-free and high-quality eggs.

Major Importers of Eggs



- 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.
- The EU's egg supply has tightened due to new cage-free regulations, while demand from food manufacturers remains robust. To bridge the gap, imports are being used to meet the growing demand.

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.

Trade challenges for Indian exports

- Hong Kong enforces targeted suspensions on poultry egg imports from specific Indian districts affected by H5N1 avian influenza, such as Udhampur Singh Nagar in Uttarakhand (banned December 4, 2025), West Godavari and others in Andhra Pradesh (March 2025), and Rampur/Gorakhpur in Uttar Pradesh (October 2025). These measures, under a bilateral protocol with India, require immediate shipment halts upon WOAH notifications and health certificates for compliance, with no overall egg imports from India recorded in 2024-2025. The Centre for Food Safety monitors outbreaks for potential resumption, minimizing broader trade impacts unlike quota-based systems elsewhere.

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.

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

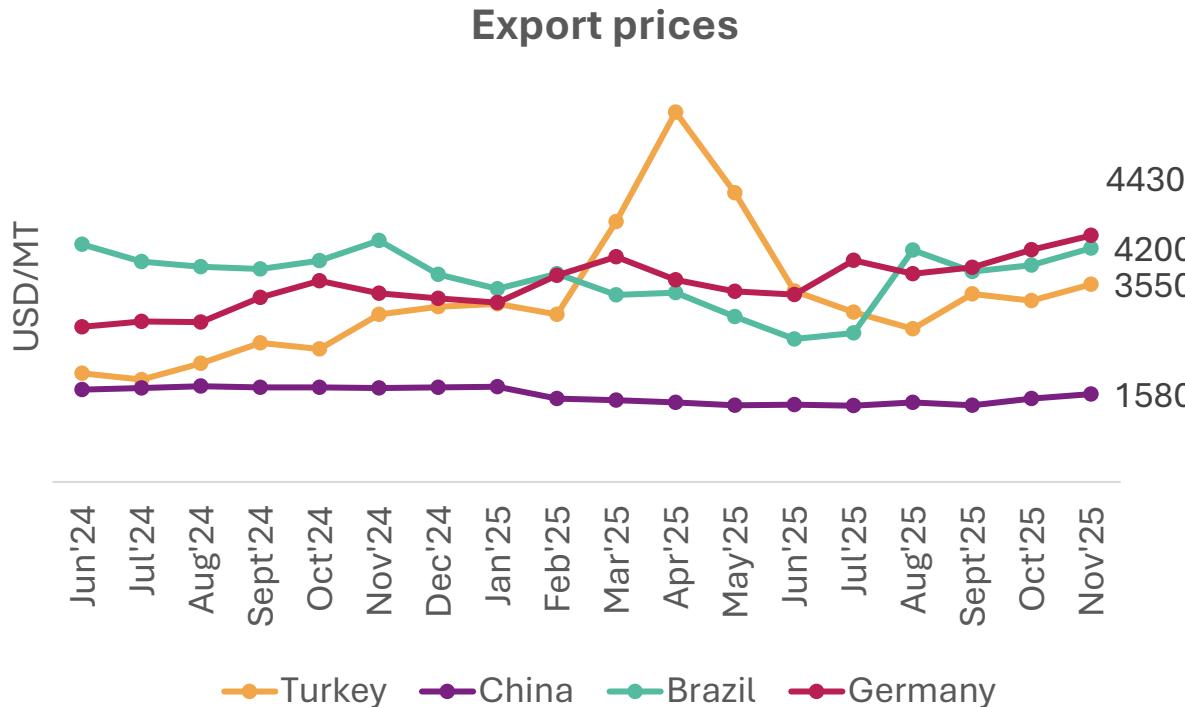
New opportunities to boost Indian egg exports

- **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.
- 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 Uzbekistan

- India can capitalize on Uzbekistan's surging poultry imports and recent market opening by securing veterinary approvals via APEDA, ensuring Halal certification, Salmonella-free testing, and WOAH-compliant avian flu notifications for table eggs from Namakkal hubs.
- Leverage bilateral ties from Indian firms like Avee Broilers establishing facilities there (2025 projects for 4M broilers) to negotiate protocols, pricing eggs competitively at \$1,100-1,300/ton FOB Chennai (Grade A, 55g+ clean shells), undercutting European suppliers amid Uzbekistan's 6.7B egg production shortfall.
- Streamline logistics via Single Window permits, health certificates 30 days pre-shipment, and cold chains to Tashkent, targeting retail/bakery demand while building joint ventures for sustained access.

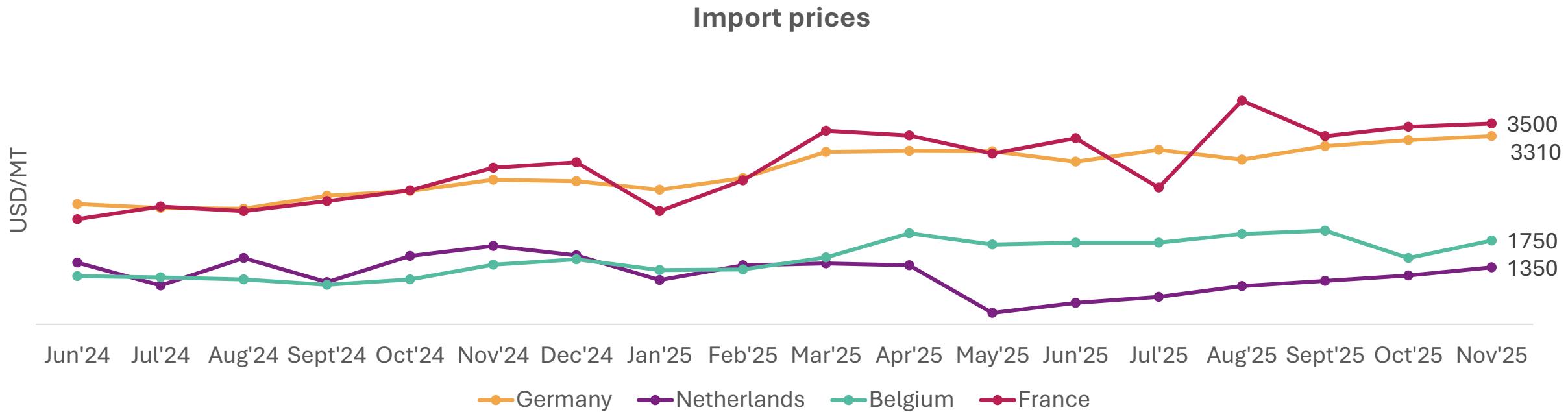
Export prices of Eggs



Price outlook for next quarter (DJF)					
Countries	Nov'25 Price (USD/MT)	Nov'24 Price (USD/MT)	%age change	Price direction	Average price range for DJF (USD/MT)
Turkey	3550	3010	18%	Bullish	3500-3700
China	1580	1690	-7%	Bullish	1600-1700
Brazil	4200	4340	-3%	Bullish	4250-4350
Germany	4430	3393	31%	Bullish	4450-4600

- 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.
- 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.

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 serves as Europe's primary egg re-export hub, supported by robust production and efficient trade networks. Since mid-2024, imports of specialty eggs such as organic, free-range, and cage-free have risen due to EU animal welfare regulations and shifting consumer preferences in Germany and the Nordic countries, though temporary port disruptions briefly elevated prices.
- **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.

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



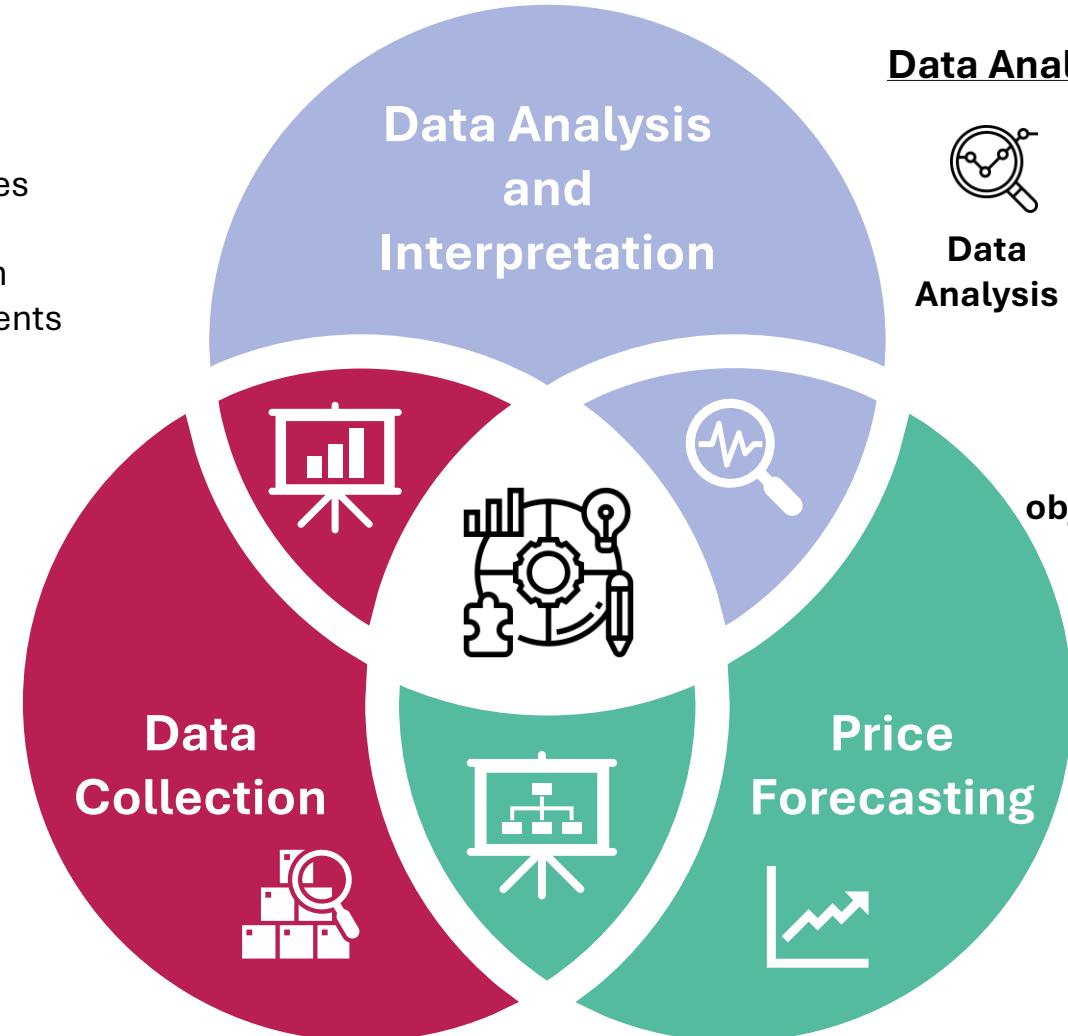
Sources

- 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.