

# Monthly dashboard – Eggs

HSN Code: 0407

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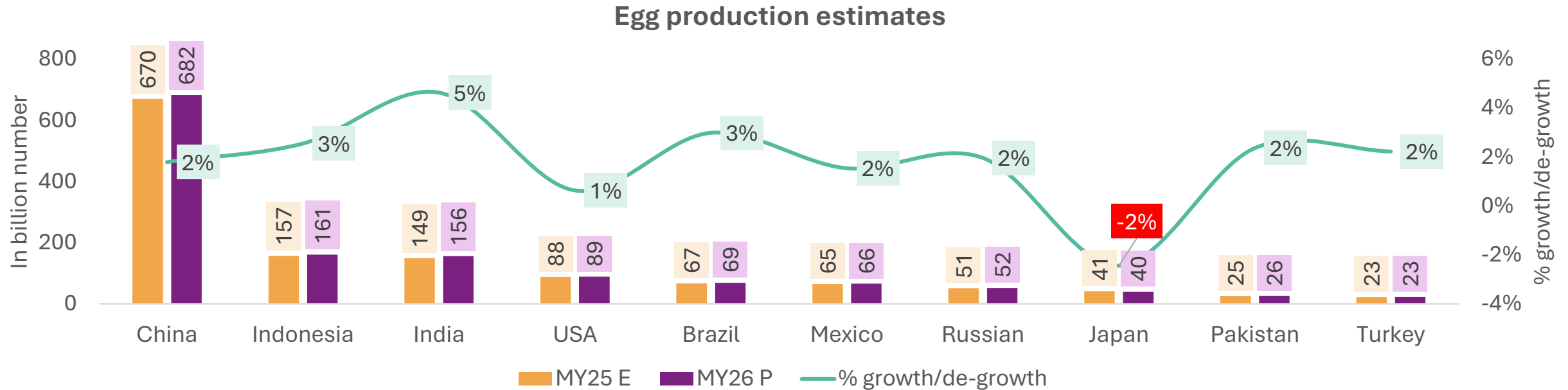
March 2026





## **Egg production estimates**

# Egg production estimates



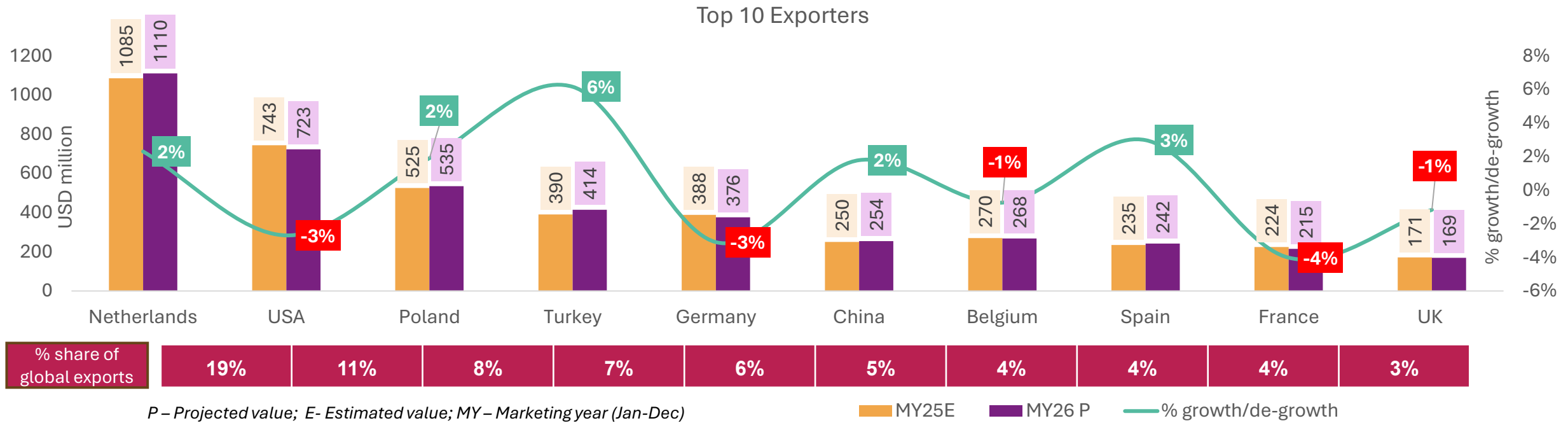
*P – Projected value; E – Estimated value; MY – Marketing year (Jan-Dec)*

- **Global egg production is projected to witness moderate growth in MY26P**, supported by strong demand for affordable protein, though expansion is expected to remain uneven due to disease risks and cost pressures.
- China is expected to maintain its leading position with steady growth of approximately 2% (y-o-y), supported by large-scale production systems. However, increasing supply is likely to keep prices stable.
- **India is likely to emerge as a key growth market** (~4–5%), supported by ongoing investments in layer farming, government-led nutrition programs, and rising domestic consumption.
- **The USA and Brazil are expected to see steady growth** (1–3%) and gradual flock recovery, though expansion may be cautious due to ongoing disease risks.
- Japan’s production is expected to decline (~2%), due to structural challenges such as high feed costs and aging infrastructure. Pakistan and Southeast Asian markets are likely to witness gradual growth, supported by improving domestic demand and regional trade opportunities.



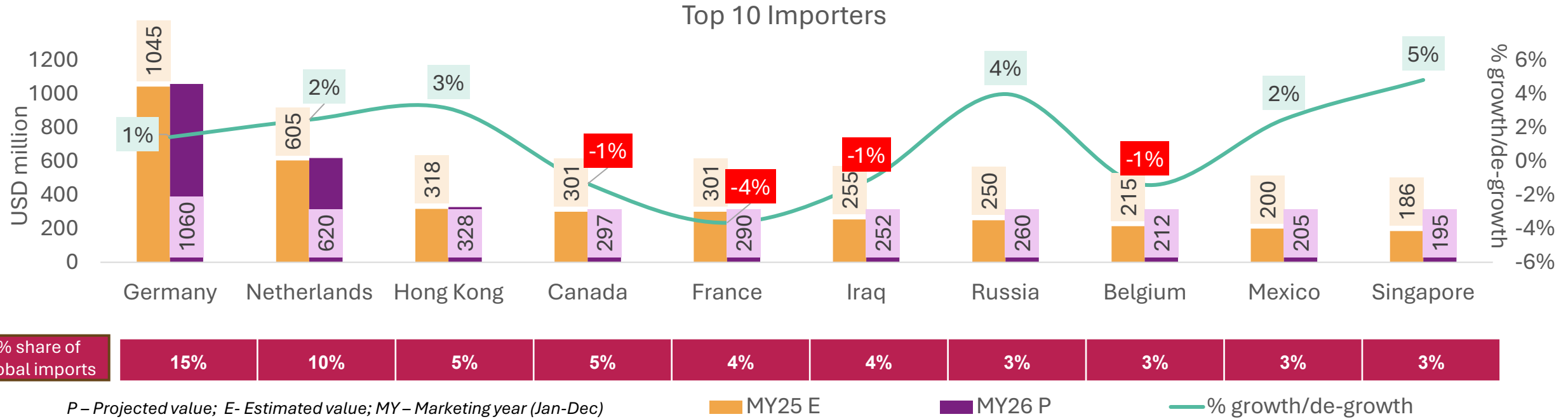
# **Export trends and price outlook**

# Major exporters of Eggs



- **The top exporters account for ~70% of global egg exports**, with overall exports in MY26P expected to grow by 3–4%, driven by steady import demand from the Middle East, the US, Africa, and parts of Asia.
- The Netherlands is expected to maintain its leadership position, supported by its strong re-export hub role within Europe, while the USA may see a moderate decline due to severe domestic shortage caused by avian flu and culling of millions of laying hens.
- Turkey is anticipated to become a significant exporter, driven by a forecasted increase (~5-6%) in its outward shipment, leveraging logistical advantages such as road connectivity to Middle East markets during disruptions, supporting higher export volumes and pricing advantage over other suppliers including India.
- The UK is projected to see a decline in exports due to Saudi Arabia’s ban on poultry and egg product imports from the UK, given that the UK supplies almost 8% of Saudi imports.

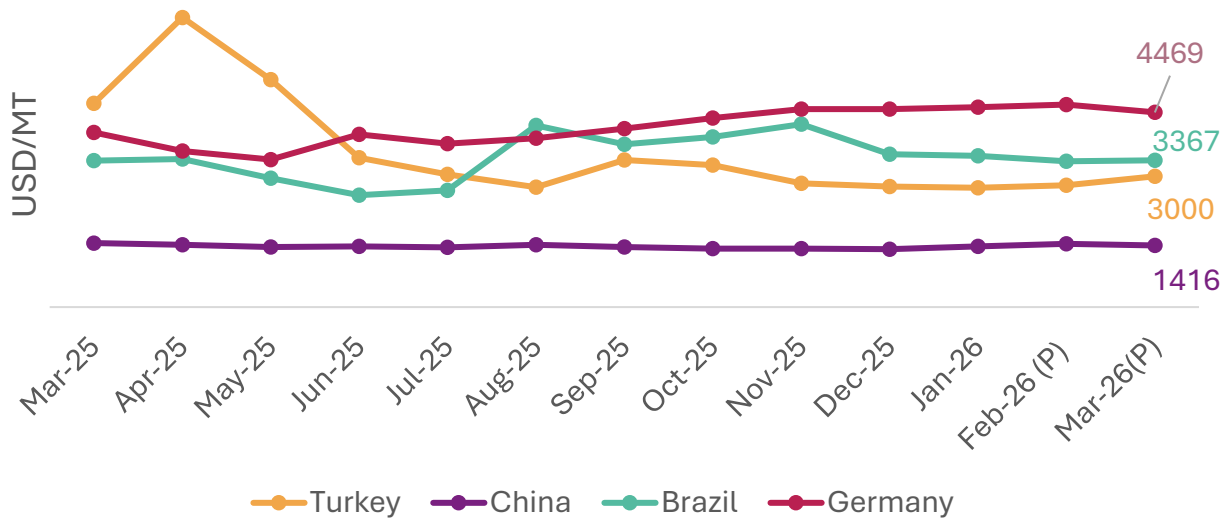
# Major Importers of Eggs



- **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 Germany, the Netherlands, Hong Kong, Russia, Singapore and Mexico.
- Avian flu outbreaks and EU-wide supply shortages driven by changing consumption patterns and increased free-range egg production are supporting higher intra-EU egg prices and keeping import demand strong in Germany and the Netherlands.
- The Middle East conflict has severely disrupted egg supplies in Iraq, which relies on imports from Turkey and Iran, causing domestic egg prices to increase from \$39.80 to \$57.40 per carton in the last week of March; however, prices are expected to ease in MY26 as alternative supply routes normalize.
- Mexico is expected to see moderate import growth (~2%), driven by diversification strategies to ensure supply stability and manage price volatility.
- In Singapore, ongoing diversification of import sources post supply shocks is favoring certified exporters and stabilizing demand for premium-priced eggs.

# Export prices of Eggs

Export Prices



P – Projected value

Price outlook for next quarter (AMJ) 2026

| Countries | Mar'26 P Price (USD/MT) | Mar'25 Price (USD/MT) | %age change | Price direction | Average projected price range for AMJ (USD/MT) |
|-----------|-------------------------|-----------------------|-------------|-----------------|--|
| Turkey    | 3000                    | 4680                  | -36%        | Bullish         | 3100-3400                                      |
| China     | 1416                    | 1470                  | -4%         | Bullish         | 1450-1480                                      |
| Brazil    | 3367                    | 3360                  | 0%          | Bullish         | 3400-3600                                      |
| Germany   | 4469                    | 4010                  | 11%         | Bearish         | 4200-4400                                      |

- **Global egg export prices in early 2026 are showing a firm but divergent trend**, with premium market like Germany witnessing price increases due to supply tightness in Q1 of 2026, while Brazil and Turkey remain relatively competitive despite recent price corrections.
- Turkey is leveraging road-based logistics to supply eggs to key Middle Eastern markets such as Saudi Arabia and the UAE amid ongoing disruptions, enabling export continuity. This logistical advantage is supporting stronger market access and is likely to keep export prices range-bound with a mild downside bias in the next quarter (Apr–Jun 2026).
- **China prices have been under pressure in recent months**, weighed down by strong domestic production; however, overall price levels are expected to rise as demand improves.
- Strong domestic consumption growth in Brazil (projected ~307 eggs /persons)<sup>1</sup> and export surge driven by global shortages (US/EU) are keeping supplies tight, supporting a bullish outlook in the next AMJ quarter despite earlier price corrections driven by oversupply.

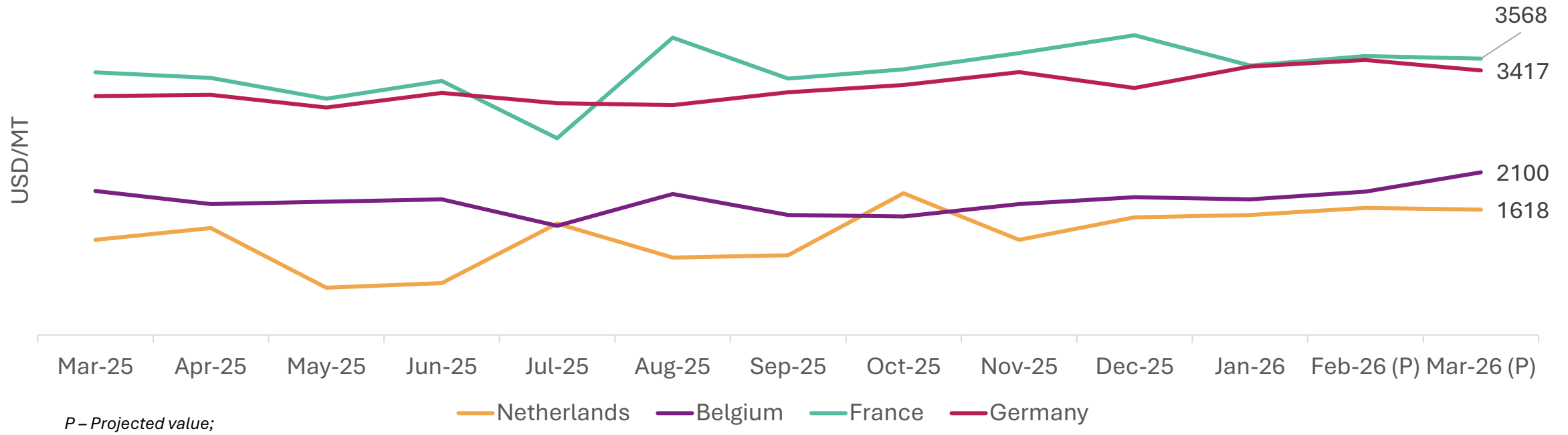
Source: Prices are from ITC Trade Map (till Jan 2026); Feb & Mar 2026 figures are seasonality and trade-based estimates (HS Code: 0407)

1- Source : Brazilian Association of Animal Protein (ABPA)

Note: Price forecasting is based on the fundamental analysis. **AMJ stand for April, May & June**

# Import prices of Eggs

Import Prices



- **EU egg import prices remain firm in early 2026**, supported by structurally tight supply following avian influenza-led flock reductions and elevated production costs, keeping prices significantly above historical averages.
- **Germany and France continue to operate in a higher price band** (USD 3400-3600/MT), reflecting strong consumption demand and reliance on intra-EU trade and imports, while **Belgium and the Netherlands remain relatively competitive** compared to Germany and France, with moderate price recovery in recent months.
- Prices are likely to stay stable to firm for major importing nations in AMJ quarter due to steady demand and tight supply, although gradual flock recovery and increasing imports may prevent significant price increases.

**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



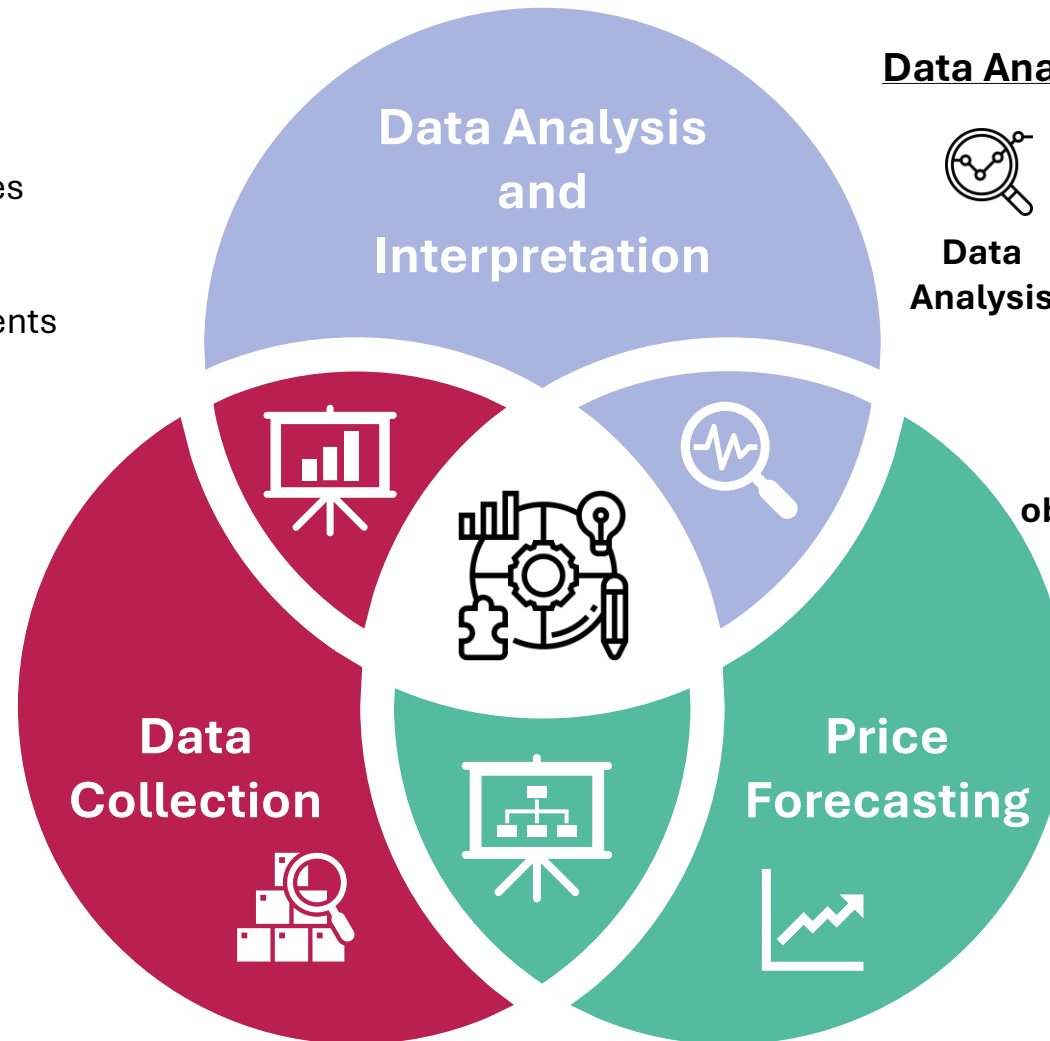
### Sources

- 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.*