Monthly dashboard – Eggs

HSN Code: 0407

April -2026

Egg production estimates

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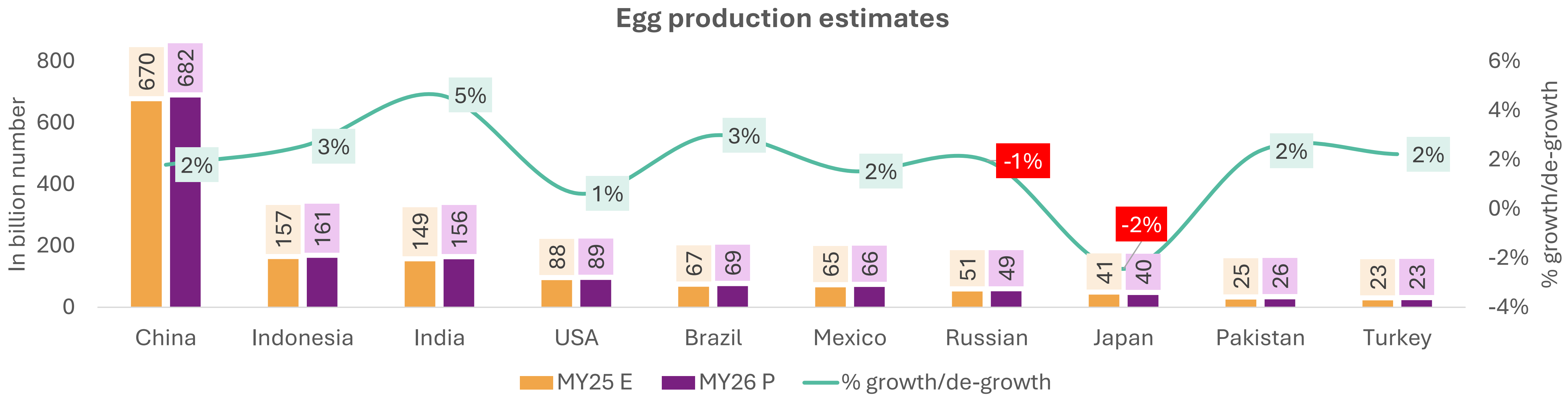


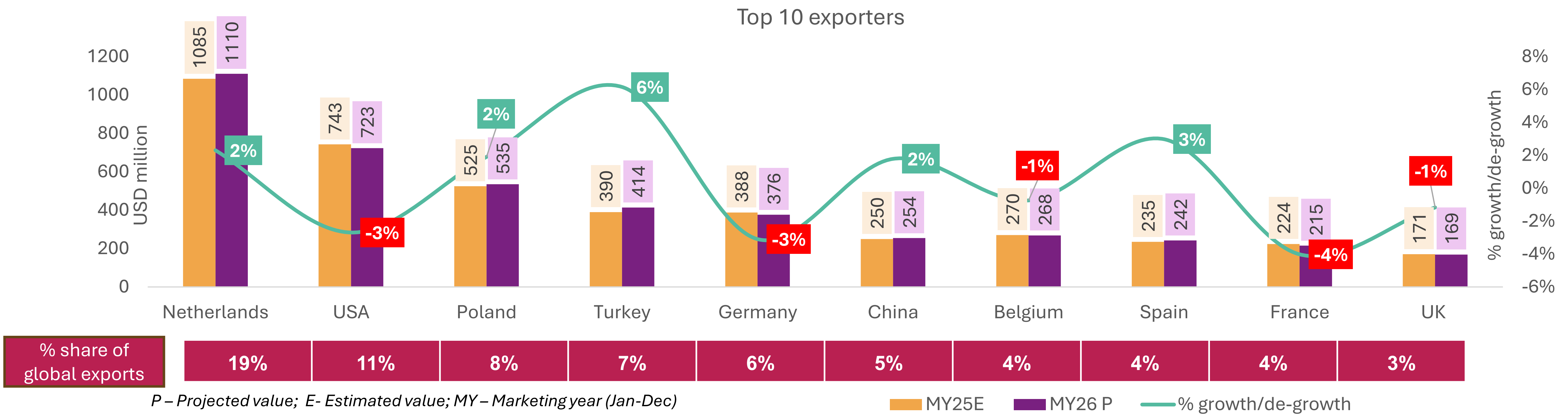
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- **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%, 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% on year in MY26P), 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.
- Russia's poultry sector downturn in Q1 2026 is likely to place downward pressure on egg production, as producers face mounting financial stress. Declining profitability is being driven by a combination of rising electricity and logistics costs, weak domestic prices, and increasing import competition from China.

Source: Production for MY 25 and MY 26 is estimated and projected, respectively, based on historical trends from FAOSTAT; and secondary research

Export trends and price outlook

Major exporters of Eggs

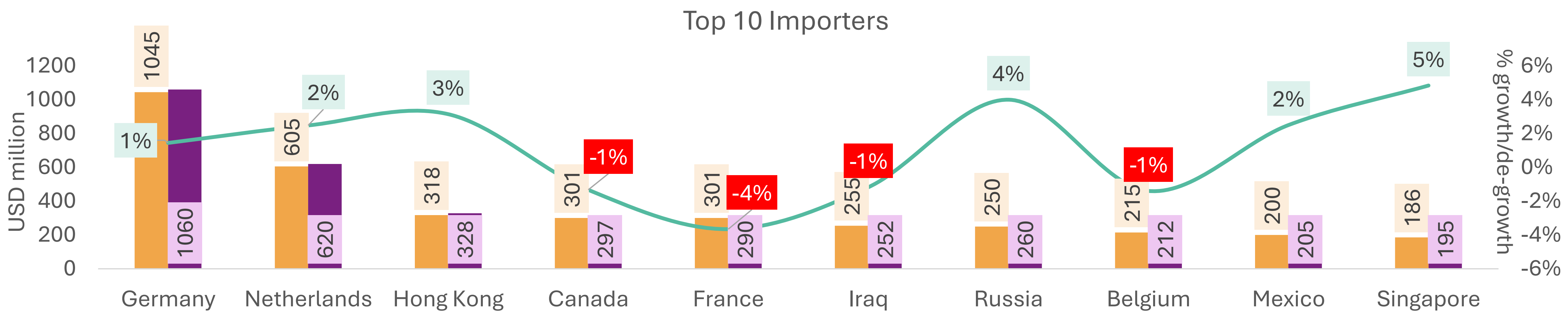


P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- **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 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 hens.
- Turkey is expected to become a major exporter, with an estimated 5-6% increase in MY26P. It will leverage logistical advantages, such as road connectivity to Middle Eastern markets during disruptions, to support higher export volumes and gain a pricing edge over competitors like India.
- The UK is projected to witness a decline in exports during MY26P due to the ban on poultry and egg product imports by Saudi . Saudi caters to about 4% of UK exports.

Source: MY25E export volumes are from ITC Trade Map, with estimates used where recent data is unavailable; MY26P figures are based on trade estimates & export trends and secondary research. (HS Code: 0407)

Major Importers of Eggs



% share of global imports	Germany	Netherlands	Hong Kong	Canada	France	Iraq	Russia	Belgium	Mexico	Singapore
	15%	**10%**	**5%**	**5%**	**4%**	**4%**	**3%**	**3%**	**3%**	**3%**

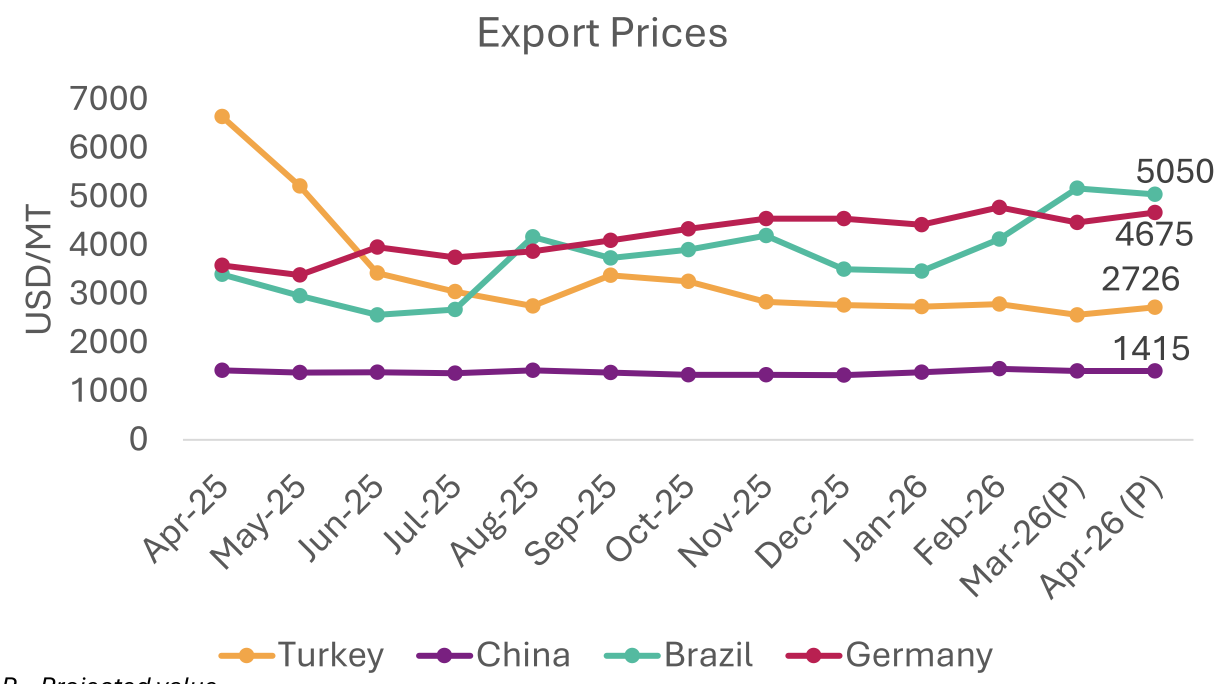
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

MY25 E MY26 P % growth/de-growth

- **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, 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 & 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 last week of March, however the trade expects the prices to be subdued in Q2 MY26P with lifting of import ban.
- Mexico is expected to see moderate import growth (~2%) in MY26P, 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 & stabilizing premium priced demand.

Source: MY25E import volumes are from ITC Trade Map, with estimates used where recent data is unavailable; MY26P projected figures are based on trade estimates & export trends. (HS Code: 0407)

Export prices of Eggs



P – Projected value

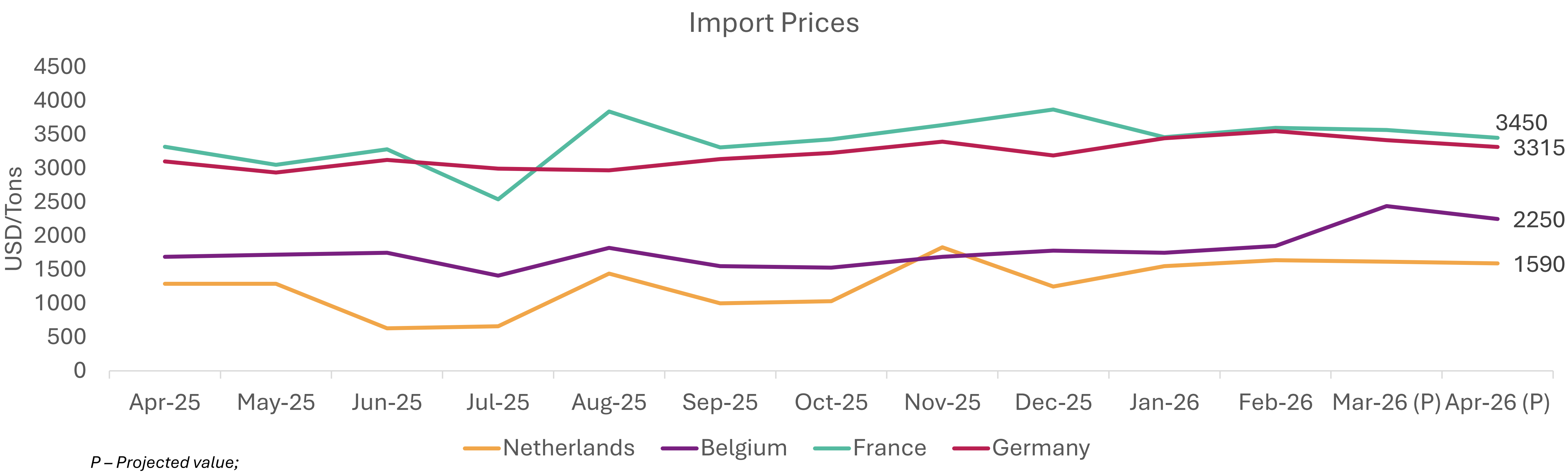
Price outlook for next quarter (MJJ) 2026					
Countries	Apr'26 P Price (USD/MT)	Apr'25 Price (USD/MT)	%age change	Price direction	Average price range for MJJ (USD/MT)
Turkey	2726	6650	-59%	Bullish	3100-3400
China	1415	1430	-1%	Bullish	1450-1480
Brazil	5050	3400	49%	Bearish	4600-4800
Germany	4675	3585	30%	Sideways	4600-4800

- **Global egg export prices are expected to remain firm through the upcoming quarter,** supported by avian influenza detection in India & Western African countries (Ivory Coast), resilient global protein demand, and higher logistics & compliance costs in premium markets.
- China is expecting a nominal uptick trend in export prices supported by improved demand from South-eastern countries such as Philippines, Malaysia & Cambodia.
- Reduced demand from US which caters to almost ~70% of Brazilian egg exports is expected to put downward pressure on prices for the upcoming quarter after US tariffs reduced the exports in Q1 CY 26.
- Germany's export prices are expected to stay steady with a positive outlook, driven by rising demand for protein sources in the EU and growing consumer interest in white egg-laying hens.

Source: Prices are from ITC Trade Map (till Feb 2025); Mar & Apr 2026 figures are seasonality and trend-based estimates (HS Code: 0407)

Note: Price forecasting is based on the fundamental analysis. ***MJJ stand for May June & July***

Import prices of Eggs



P – Projected value;

- Egg import prices across key EU markets is expected to witness a declining trend in April 2026 after elevated prices during Q1 MY 26. The correction is primarily driven by post-Easter demand normalization, improved regional supply availability.
- While avian influenza concerns continued to restrict aggressive price decline, the overall market sentiment shifted from bullish to stable across most European importing countries.
- France is expected to witness a softness in prices (~3% mom in April '26) after the incremental increase post easter demand.
- Belgium egg prices are expected to ease in the month of April with Hungary (largest exporter to Belgium) setting up new poultry plants to cater to domestic demand.

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

MJJ stand for May , June & July

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.

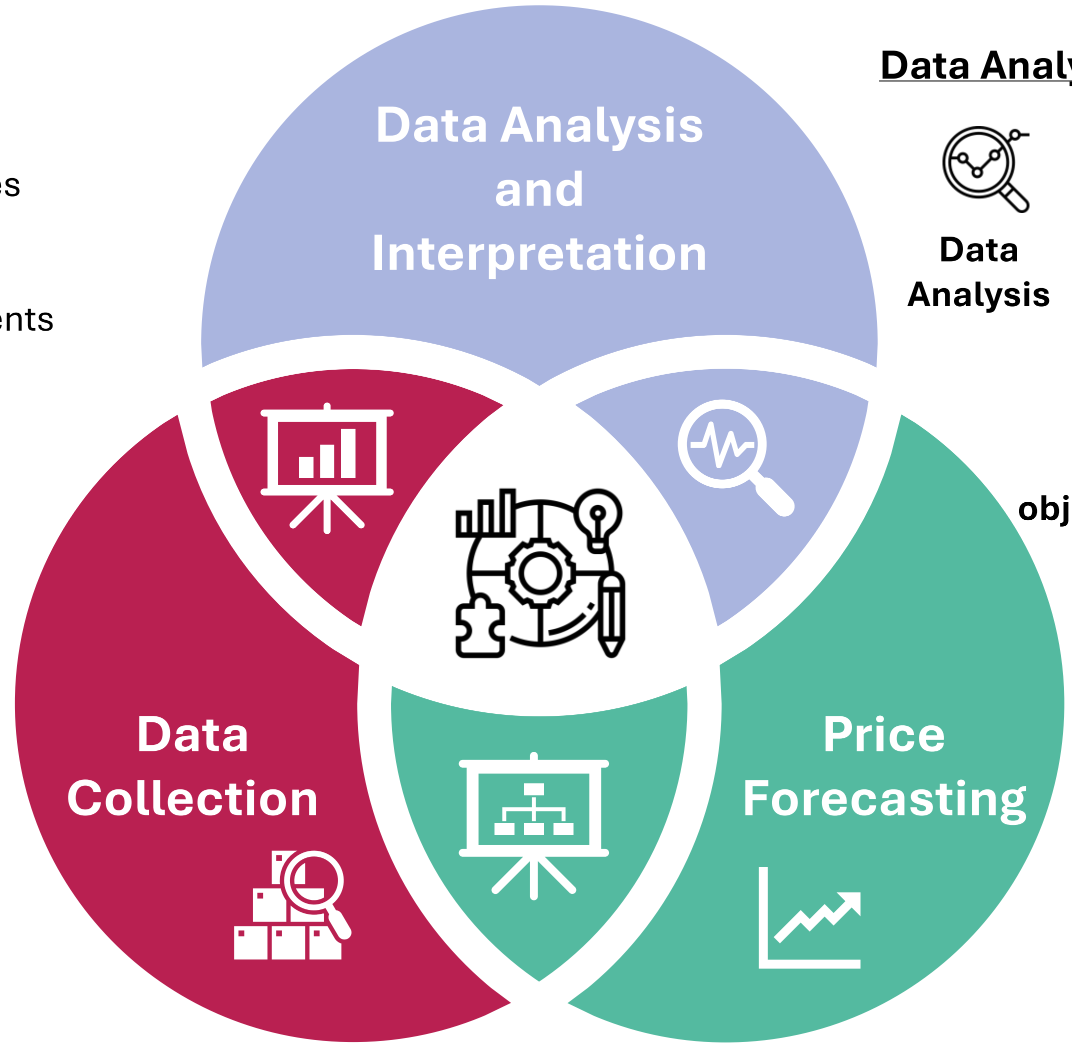
Data Collection

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.