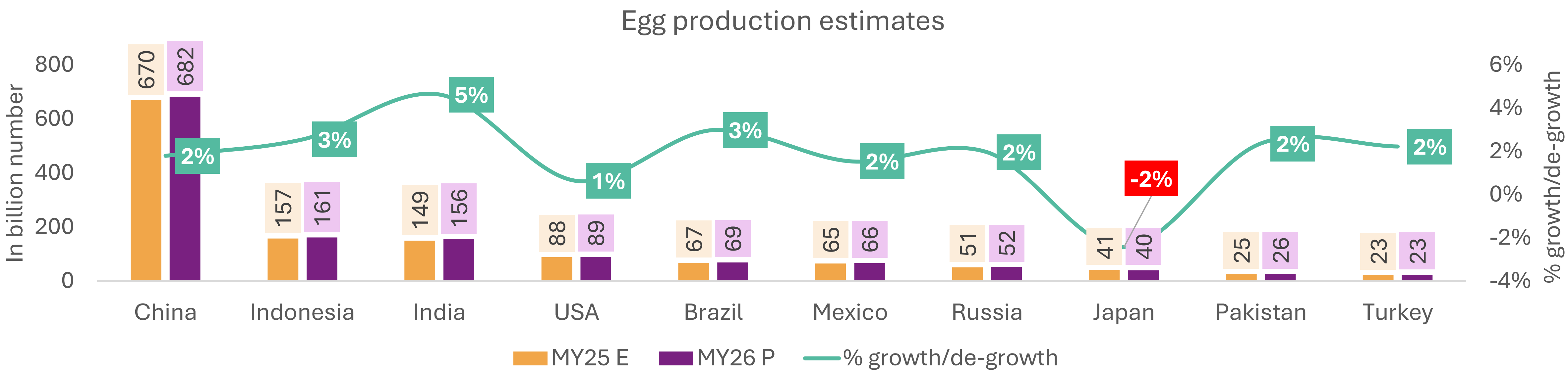
Monthly dashboard – Eggs

HSN Code: 0407

June 2026

Egg production estimates

Egg production estimates



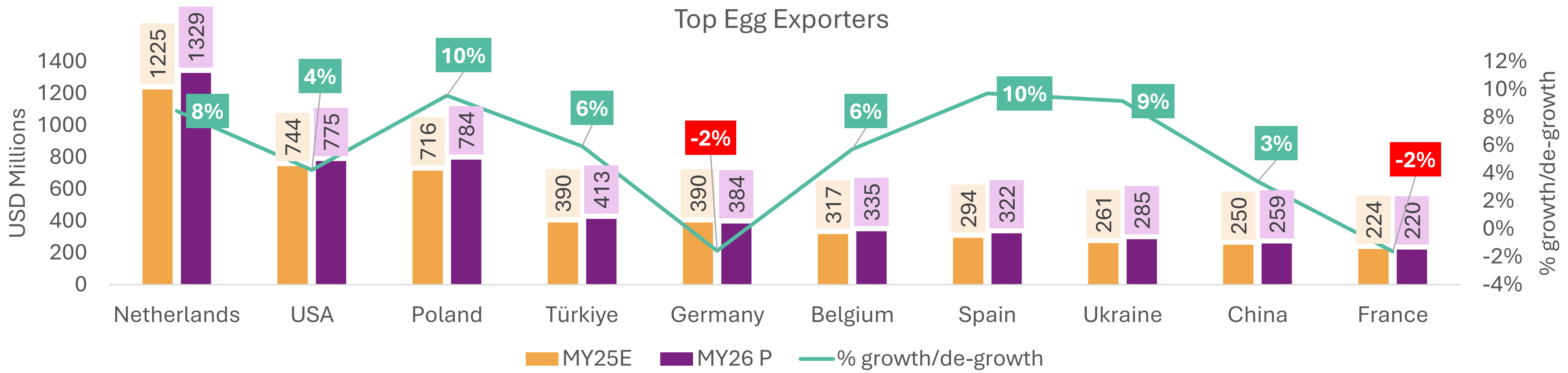
P – Projected value; E- Estimated value; MY – Marketing year (Jan-Dec)

- **Global egg production is projected to record moderate growth (~3%) in MY26P**, supported by strong demand for affordable protein, and robust growth in China, India, Indonesia & Brazil.
- **China** is expected to maintain its leading position with steady growth of **~2% expected in MY26P**, 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** (~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 record modest growth (1–3%) as flock recovery progresses, though expansion is likely to remain cautious due to persistent disease risks.
- Japan is expected to witness a modest decline (~2%) as it witnessed culling of birds due to bird flu outbreaks.

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



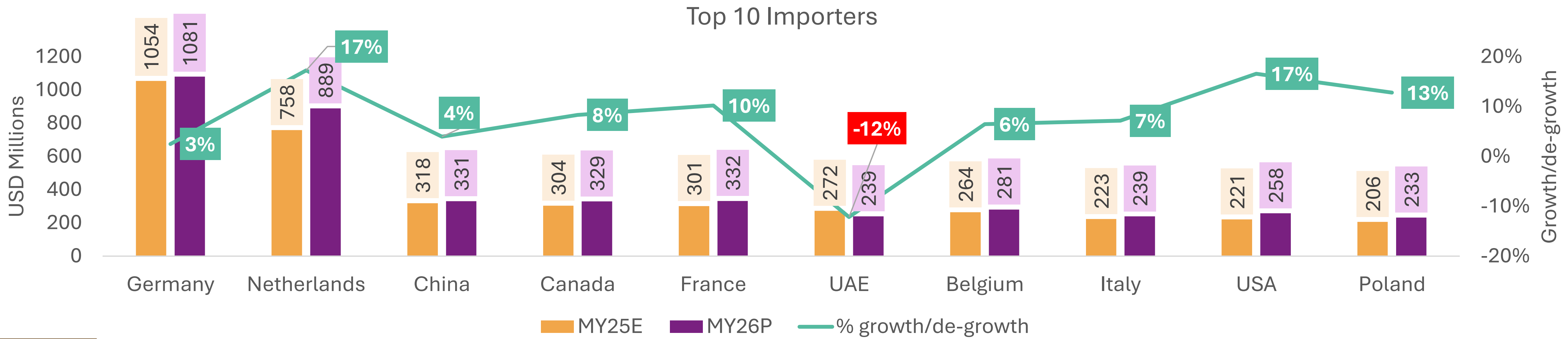
% share of global exports	17%	10%	10%	5%	5%	4%	4%	3%	3%	3%

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

- **The countries in the chart account for ~65% of global egg exports**, with overall exports in MY26P expected to grow by ~3–4%, driven by steady import demand from USA, 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 is also expected to witness an increase in egg exports in MY26P backed by an ~6%[1] increase (MoM) in average layer inventory in May 2026.
- **Poland's exports are projected to increase (~10% YoY in MY26P)** backed by strong production, competitive pricing, and supply gaps in key importing markets caused by avian influenza.
- **Ukraine's egg exports are expected to increase (~9% YoY in MY26P)** supported by recovering production, and sustained demand from key international markets despite ongoing logistical and geopolitical challenges.
- **China is also expecting a steady growth (~3% YoY in MY26P)** supported by sustained shipments to Hong Kong and Macau and expanding exports to emerging markets such as Sierra Leone offsetting weaker demand from some traditional destinations.

Source: MY25E export values are from ITC Trade Map, with estimates used where recent data is unavailable; MY26P figures are based on trade estimates and export trends and secondary research. (HS Code: 0407)
1: World Agricultural Supply and Demand Estimates & Livestock, Dairy, and Poultry Outlook (May'26) USDA

Major importers of eggs



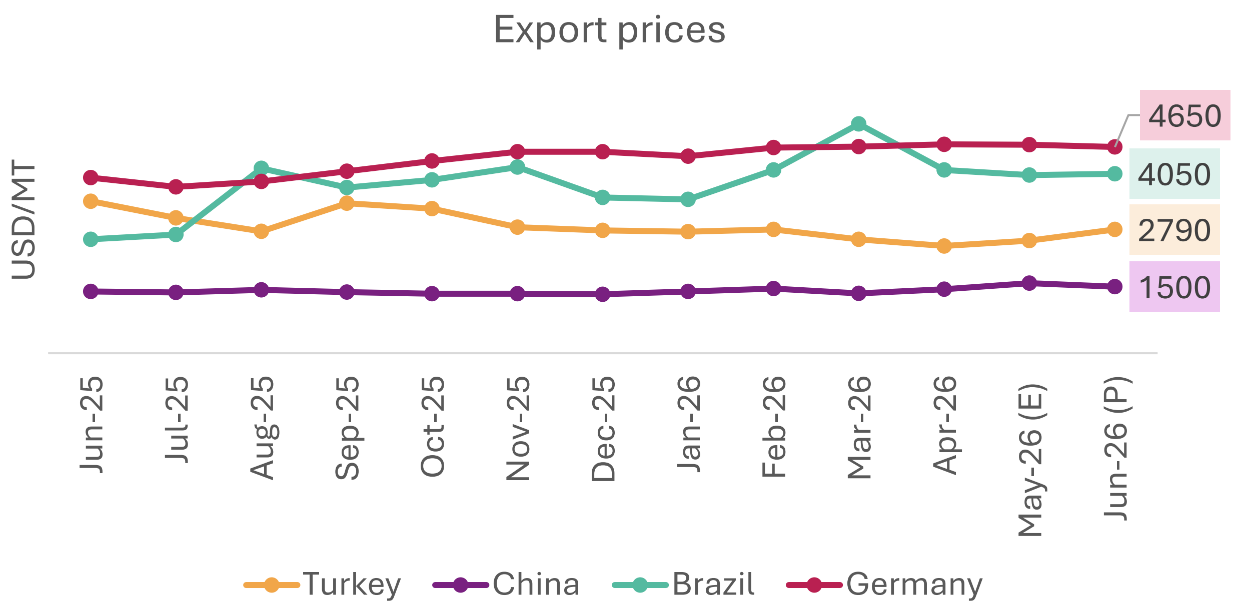
% share of global imports	14%	10%	4%	4%	4%	4%	4%	3%	3%	3%

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

- The countries in the chart represent **~53% of global egg imports**. Global imports are projected to be broadly positive with pockets of decline, with growth supported by higher demand from Germany, the Netherlands, France, Poland, Belgium, China and Italy, while declines are expected in the UAE.
- In the EU, **avian flu disruptions** and **supply tightening,** reflecting **changing consumption patterns** and **more free-range production** are keeping **intra-EU egg prices firm** and **imports strong in Poland and the Netherlands**.
- **USA is expected to witness an increase (~17% YoY in MY26P),** as highly pathogenic avian influenza (HPAI)-related supply shortages and elevated domestic prices continue to drive additional sourcing from countries such as Turkey, and Brazil, despite flock recovery.
- **The UAE's egg imports are expected to decline (~12% YoY in MY26P),** as geopolitical conflicts and lower shipments from India are expected to tighten import availability.

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

Export prices of eggs



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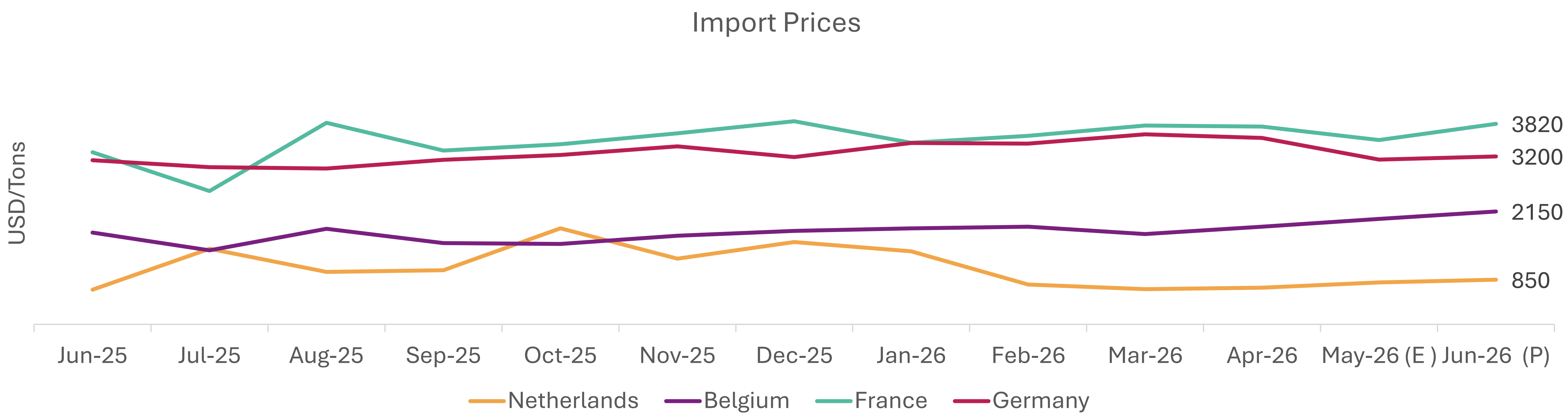
Price outlook for next quarter (JAS) 2026					
Countries	**Jun'26 P Price (USD/MT)**	**Jun'25 Price (USD/MT)**	**%age change**	**Price direction**	**Average projected price range for JAS (USD/MT)**
Turkey	2790	3430	**-19%**	**Bullish**	2800-2900
China	1500	1390	**8%**	**Bullish**	1555-1600
Brazil	4050	2570	**58%**	**Bullish**	4600-4700
Germany	4650	3962	**17%**	**Sideways**	4500-4700

- The global egg export market is expected to remain firm to moderately bullish during JAS 2026, supported by resilient import demand and lingering HPAI-related supply constraints in several producing regions, although improving production in some exporting countries is likely to limit sharper price increases.
- **Rising export shipments to Hong Kong and other Asian markets,** alongside firm regional demand are expected to keep Chinese egg export prices on an upward trend.
- **Strong demand from Middle Eastern markets**, coupled with **Turkey's competitive pricing relative to EU suppliers** and expanding cold-chain export infrastructure, is expected **to support export prices in the upcoming quarter** despite recent geopolitical uncertainties in the region.
- **Brazilian export prices are expected to remain strongly bullish during JAS 2026,** led by continued demand from HPAI-affected importing markets.
- **Improving EU egg availability is expected to offset firm production costs**, keeping German export prices broadly stable during upcoming quarter.

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

Note: Price forecasting is based on the fundamental analysis.
JAS stand for July August and September 2026

Import prices of eggs



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- **Recovering egg production across the EU following HPAI-related disruptions** is expected to improve overall supply availability. However, sustained import demand from structurally deficit markets such as Germany is likely to keep regional egg prices firm.
- Greater availability of eggs from Poland and Ukraine is expected to exert downward pressure on import prices in the Netherlands, although steady demand from the processing industry should help prevent sharper declines keeping the prices stable.
- Germany's continued reliance on imports, coupled with robust retail demand, is expected to support import prices marginally month on month despite improving egg availability across the EU.
- Strong domestic consumption and ongoing dependence on intra-EU sourcing are expected to keep French import prices on an upward trajectory, even as regional supply conditions gradually improve.

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

HPAI stands for Highly Pathogenic Avian Influenza

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.

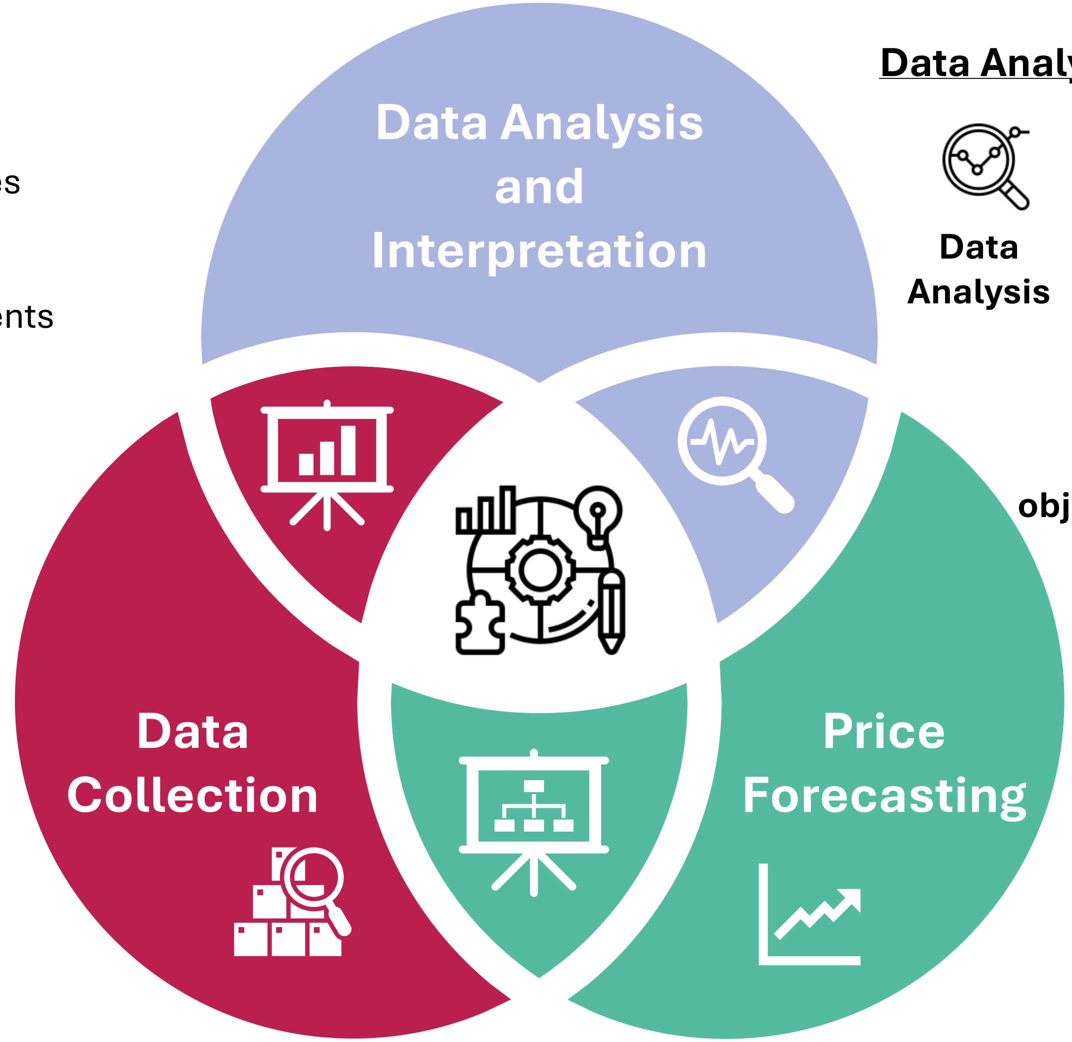
Data Collection

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.