

Egg production



Current industry landscape,
historical performance
and forecasts

2025



Egg production

Current state of the industry, historical performance and forecasts

Market environment

The egg production market in Ukraine is showing positive dynamics, recovering from the challenges caused by the military conflict.

According to preliminary data, industrial egg production in 2024 increased by +3.1% (by 24 thousand tonnes) compared to the same period last year. While the number of consumers has declined significantly, monthly production has reached pre-war levels.

A significant portion of the total volume (about 4.6%) was produced in the areas where military operations are ongoing, demonstrating the resilience of the industry during times of war.

Infrastructure and investments

Ukrainian egg producers are actively investing in modernising their production facilities. Notably, they are implementing cage-free poultry housing systems, automating egg rearing and collection processes, and utilising IT solutions for monitoring poultry health and optimising other operations. These measures are aimed at increasing the competitiveness of Ukrainian producers in the international market.

Significant investments are required to increase production of eggs and poultry meat. The livestock development programme is targeting \$1.3 billion in investments to boost production and exports of poultry products. A particular emphasis is placed on developing exports to the Middle East.



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Current industry landscape, historical performance and forecasts

Logistics

Logistical challenges are still a substantial hurdle for Ukrainian poultry producers seeking to enter new markets. Complex logistics processes result in delayed exports and restricted geographical expansion.

The livestock development programme aims to double egg production by 2030. Achieving this goal will require the resolution of logistical issues to ensure efficient exports.

Demand in foreign markets

Ukrainian egg producers are active in foreign markets. In 2024, egg exports remained stable at around 20 thousand tonnes. The Netherlands (13%), Israel (14%), Poland (10%) and Italy (9%) were the main buyers of Ukrainian eggs.

However, the share of exports to the Middle East is gradually declining due to high competition in the region. The EU market remains a priority due to its convenient logistics.



Egg production

Current industry landscape, historical performance and forecasts

Production (in thousands of tonnes)

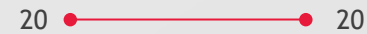


+14,7%

24E

33F

Exports (in thousands of tonnes)



0,0%

24E

33F

Price dynamics (in \$ per tonne)



+27,2%

24E

33F

Prospects

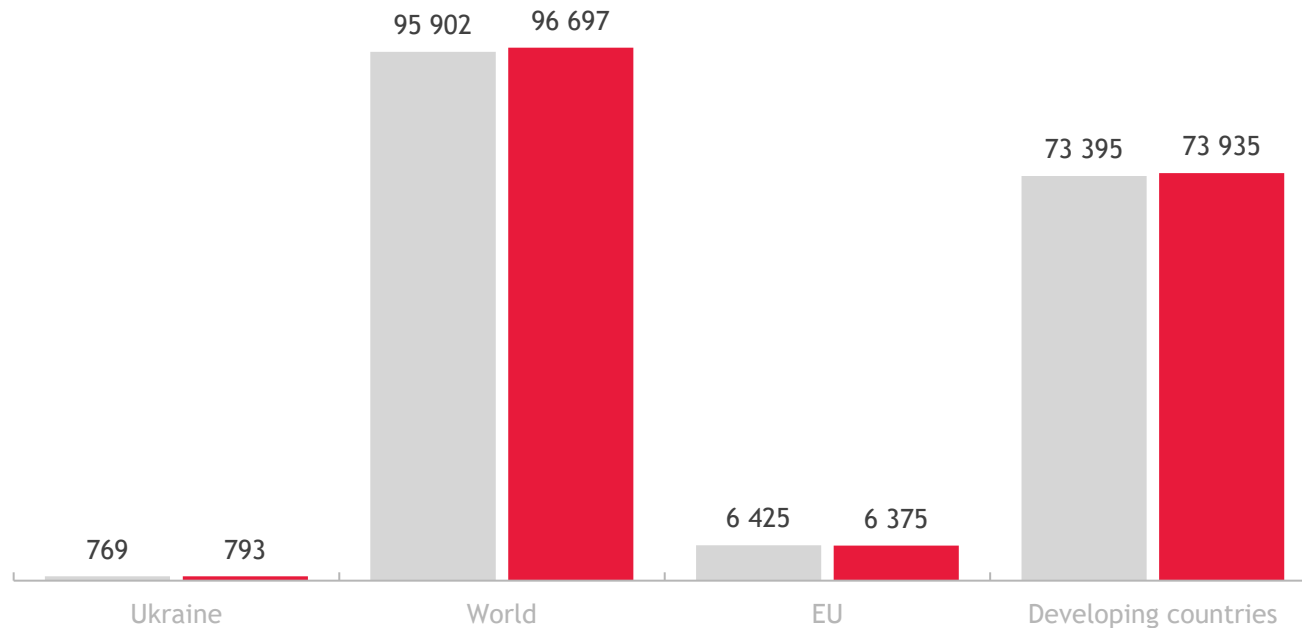
The outlook for Ukraine's egg production industry from 2025 to 2033 is optimistic. Production volumes and product value are expected to increase steadily over time, creating favourable conditions for the development of both the domestic market and exports.

The positive production growth rate will guarantee that domestic demand is satisfied, and the value of Ukrainian products will increase revenues from international sales, assuming export volumes remain stable.

The global egg production market is showing stable, moderate growth, with developing countries remaining key producers, accounting for over 76% of the global total.

Dynamics of egg production (in thousands of tonnes)

2023 | 2024

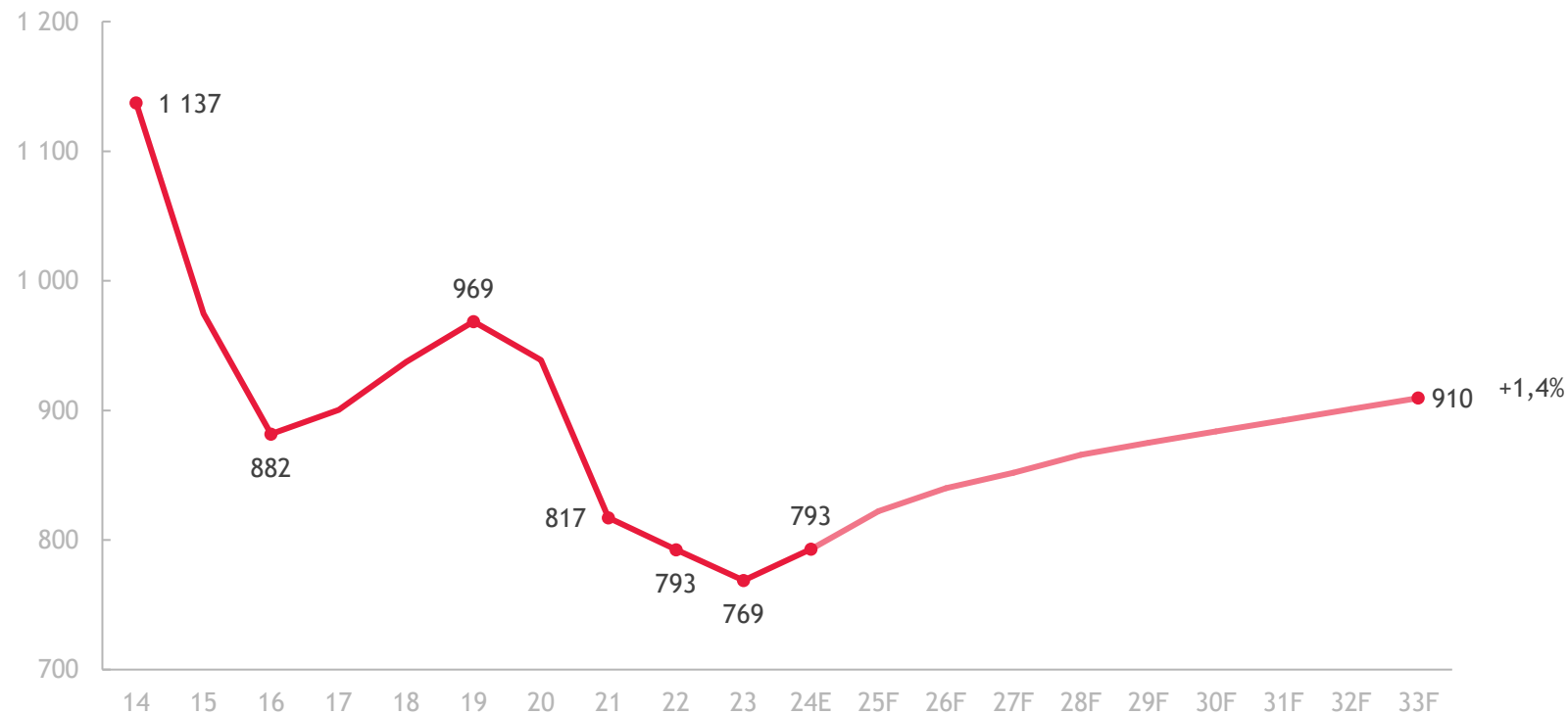


- ▶ **Ukraine's egg production increased** from 769 thousand tonnes in 2023 to 793 thousand tonnes in 2024, representing an increase of **24 thousand tonnes** or approximately **+3.1% per year**. This **growth rate is higher than the global average**, which may indicate the recovery or improvement of production capacity in the country despite the difficult economic situation.
- ▶ **Global production increased** from 95 902 thousand tonnes in 2023 to 96 697 thousand tonnes in 2024, representing an increase of **795 thousand tonnes** (+0.8% per year). In **developing countries**, production **remained relatively stable**: from 73 395 to 73 935 thousand tonnes, an increase of 540 thousand tonnes (+0.7%). In the **EU**, there was a **slight decrease** from 6 425 to 6 375 thousand tonnes (-50 thousand tonnes or -0.8% by the end of 2024).

Starting in 2024, the egg production industry is showing signs of recovery, and by 2033 could be close to the levels of 2018-2020, although a full recovery to 2014 levels is not yet expected.

Egg production in Ukraine (in thousands of tonnes)

CAGR
(24-33)

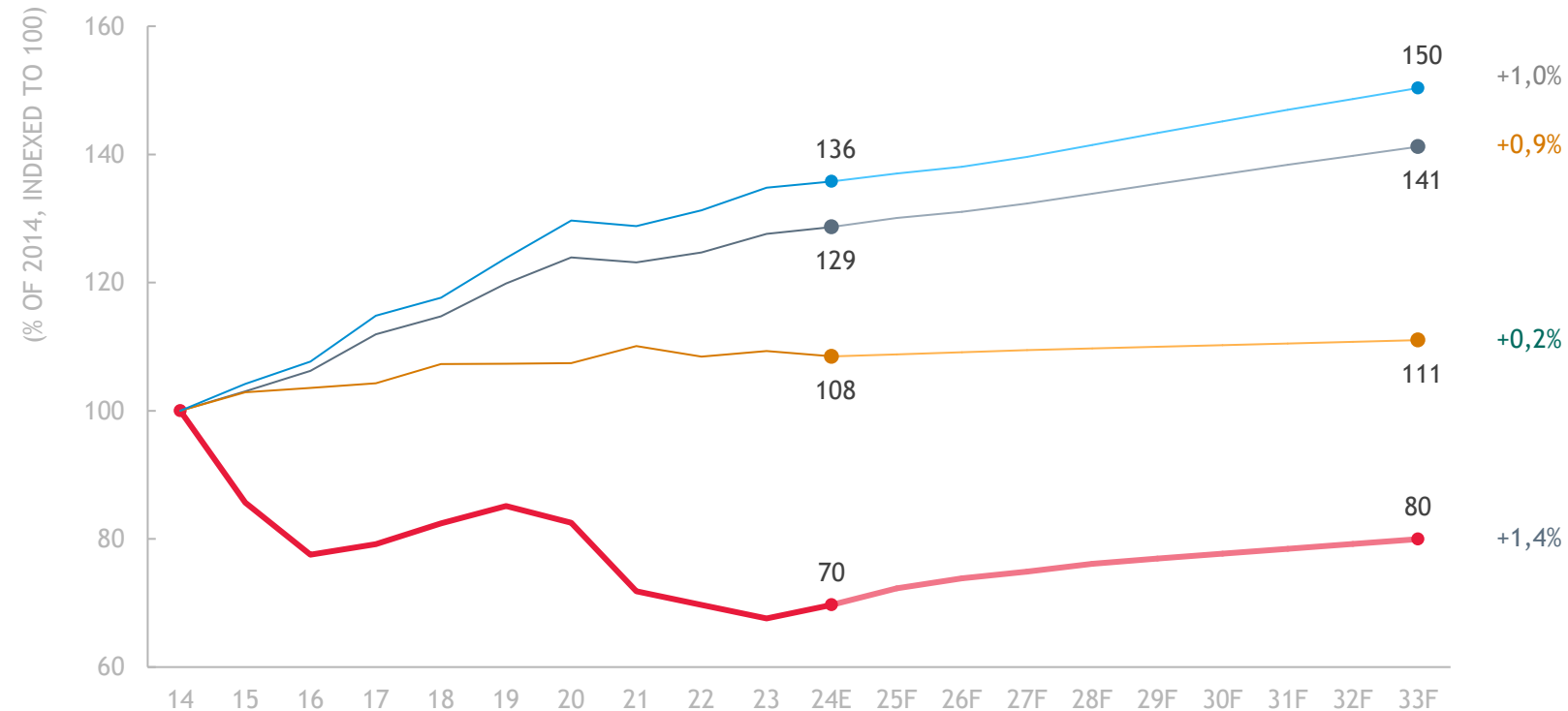


- ▶ From 2014 to 2023, egg production in Ukraine decreased from 1 137 thousand tonnes per year to 769 thousand tonnes, with a total drop of -32%. The sharpest declines occurred in 2015 (down -14.2%) and in 2021 (down -13%). The historic decline in egg production after 2014 is indicative of the impact of external shocks on the agricultural sector, including military actions and economic instability.
- ▶ Production volumes are expected to recover steadily with a CAGR of +1.4% for the 2024-2033 period. The forecast indicates a measured, albeit not accelerated, growth trajectory, which may be attributable to a prudent evaluation of the sector's recovery.

The Ukrainian egg production market shows potential for recovery with the highest CAGR, although production volumes are not expected to reach 2014 levels by 2033.

Growth rate of egg production

Ukraine | World | EU | Developing countries

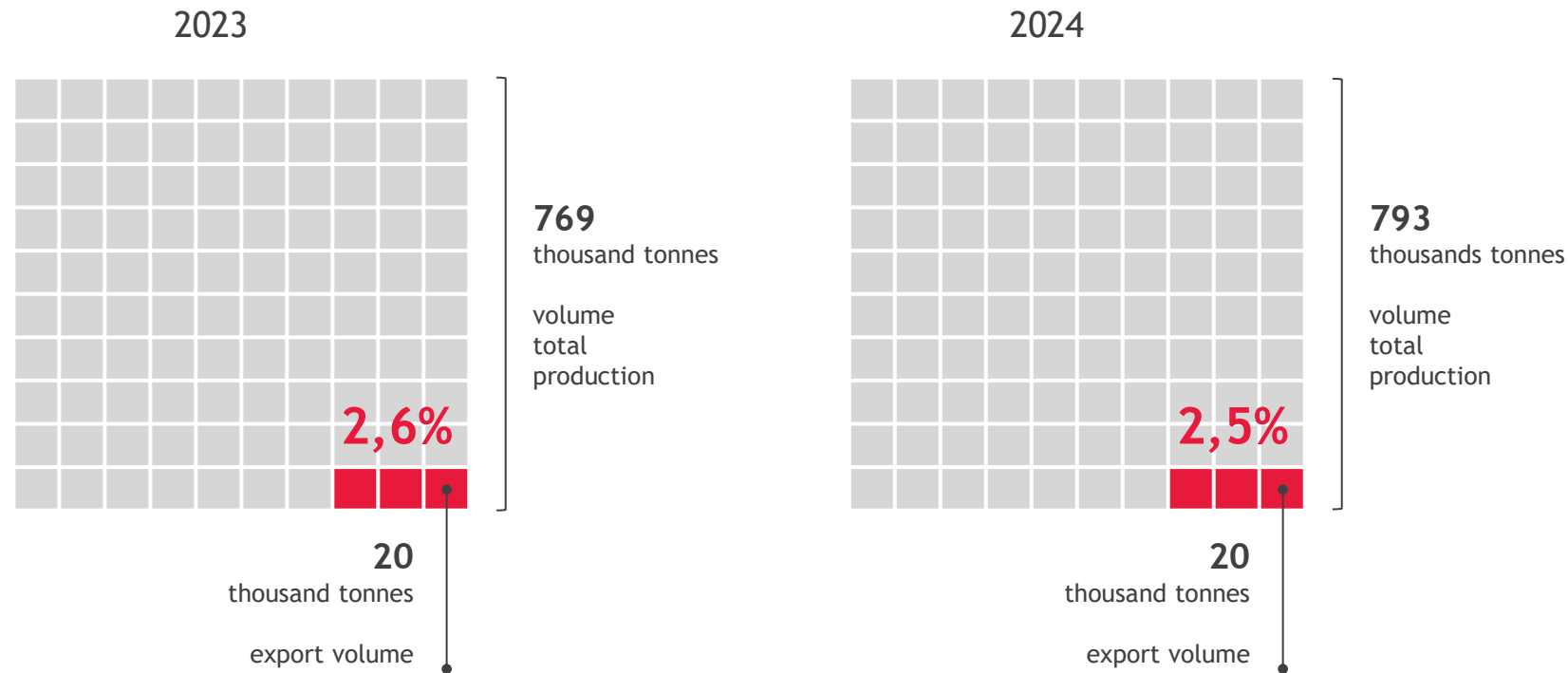


- ▶ Compared to 100% in 2014, the **Ukrainian egg production market** reached only 68% in 2023, marking a significant **decrease against the background of all analysed regions**, which showed a moderate growth. **After 2023, a slow but steady growth is forecast** to reach 80% compared to 2014 by 2033. The average annual growth rate (CAGR) for 2024-2033 for Ukraine is +1.4%, which is the highest among all regions.
- ▶ The increase in global production from 100% in 2014 to 128% in 2023, and further projected growth to 141% in 2033 with a CAGR of +0.9% indicate a **stable development of the global egg market**.
- ▶ **Developing countries** have considerable potential in the livestock production, driven by population and demand growth. The index shows a projected increase from 100% (2014) to 135% (2023), with a further rise to 150% in 2033. The **CAGR of +1.0%** makes this group **the most successful** in absolute growth.

In the context of a surge in total egg production, the **export share** declined to 2.5%, indicating trade barriers, logistical difficulties or a focus on the domestic market.

Export volumes of eggs and share in total production (in thousands of tonnes; %)

Export | Domestic consumption

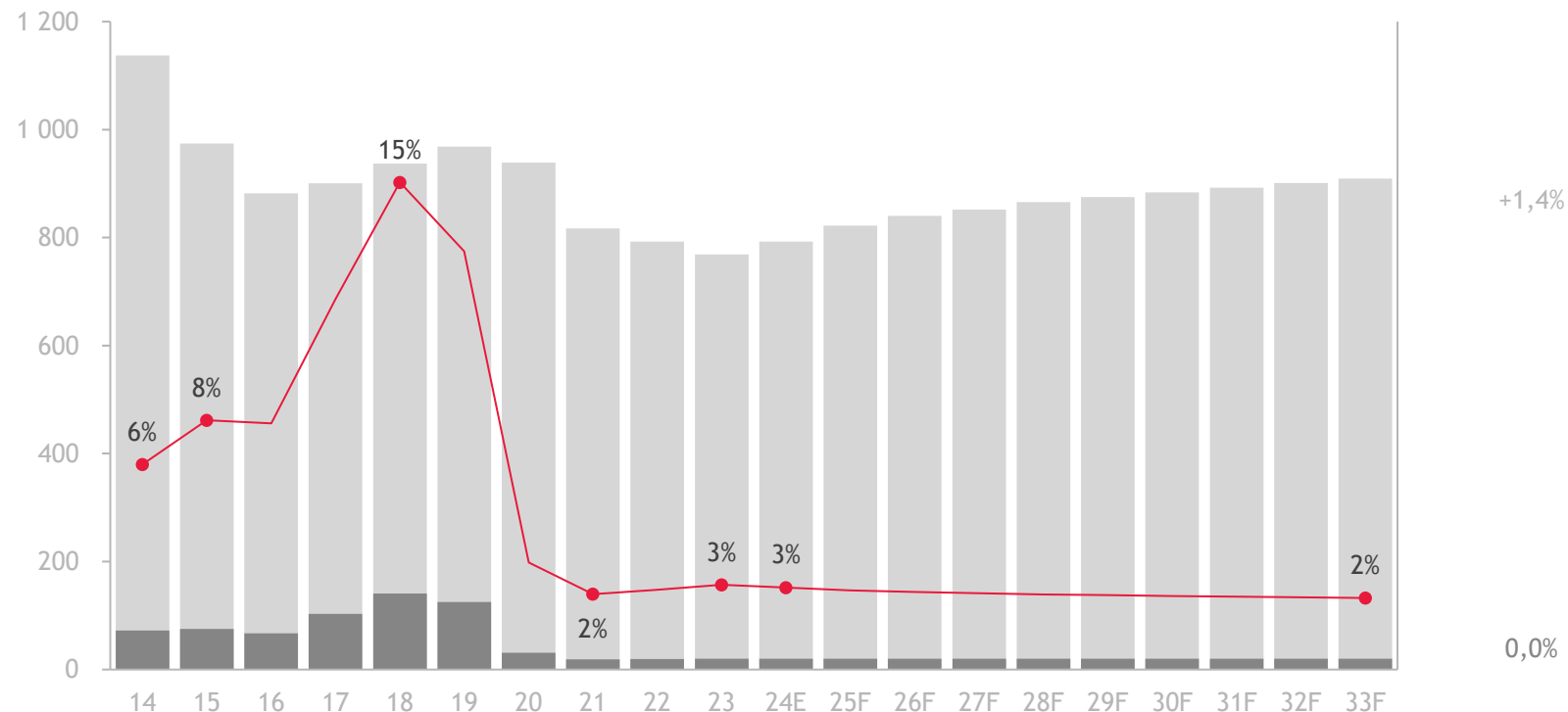


- ▶ Total egg production in 2024 increased by 24 thousand tonnes or +3.1% compared to 2023. This suggests a recovery or development in poultry production within the country, likely driven by favourable conditions or support for the industry.
- ▶ Despite the growth in total production, the volume of egg exports remained unchanged at 20 thousand tonnes.
- ▶ Should domestic demand be found to be growing, it may be advisable to consider adjusting the export strategy to ensure domestic food security.
- ▶ Investment in logistics and quality standards will guarantee that our products are competitive and meet the requirements of our international partners.

Following a substantial decline in output and shipments, the egg production sector is demonstrating signs of stabilisation and recovery. However, it should be noted that the exports have not yet returned to their pre-crisis levels.

Export volumes of eggs and share in total production (in thousands of tonnes; %)

Share of exports | Exports | Total production

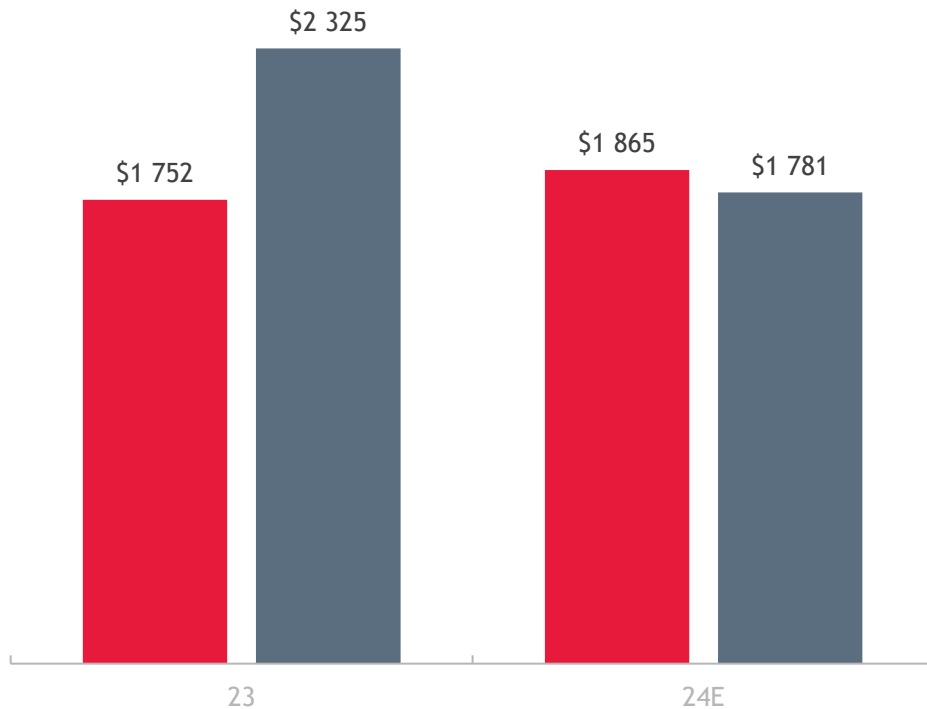


- ▶ In 2014, the volume of egg production was 1 137 thousand tonnes, but by the end of 2023 – 769 thousand tonnes, marking a decrease of -32% over 10 years. The sharpest decline occurred in 2020-2021 (from 969 to 817 thousand tonnes, or -13%), largely attributable to crisis events (namely, COVID-19, aggravation of the situation in the agricultural sector, the outbreak of the war). In 2023, there was a stabilising growth (+3.1% y-o-y to 793 thousand tonnes), indicating the industry's gradual recovery.
- ▶ The highest volumes of egg exports were recorded in 2018 – 141 thousand tonnes, which accounted for 15% of total production. Starting in 2019, the exports dropped to 31 thousand tonnes in 2020 and stabilised at 19-20 thousand tonnes in 2021. Consequently, the export share decreased from 15% (2018) to 2.6% (2023).
- ▶ The forecast indicates no significant changes to be expected, with the volume of exports set to remain at 20 thousand tonnes per year. Additionally, the share of exports in the total volume will gradually decrease to 2.2% in 2033.

Ukraine has traditionally exported eggs due to their competitive price, but in 2024 the price will exceed the global price, which will significantly reduce the export attractiveness of the product.

Cost of eggs on the Ukrainian and global markets (in \$ per tonne)

Ukraine | World

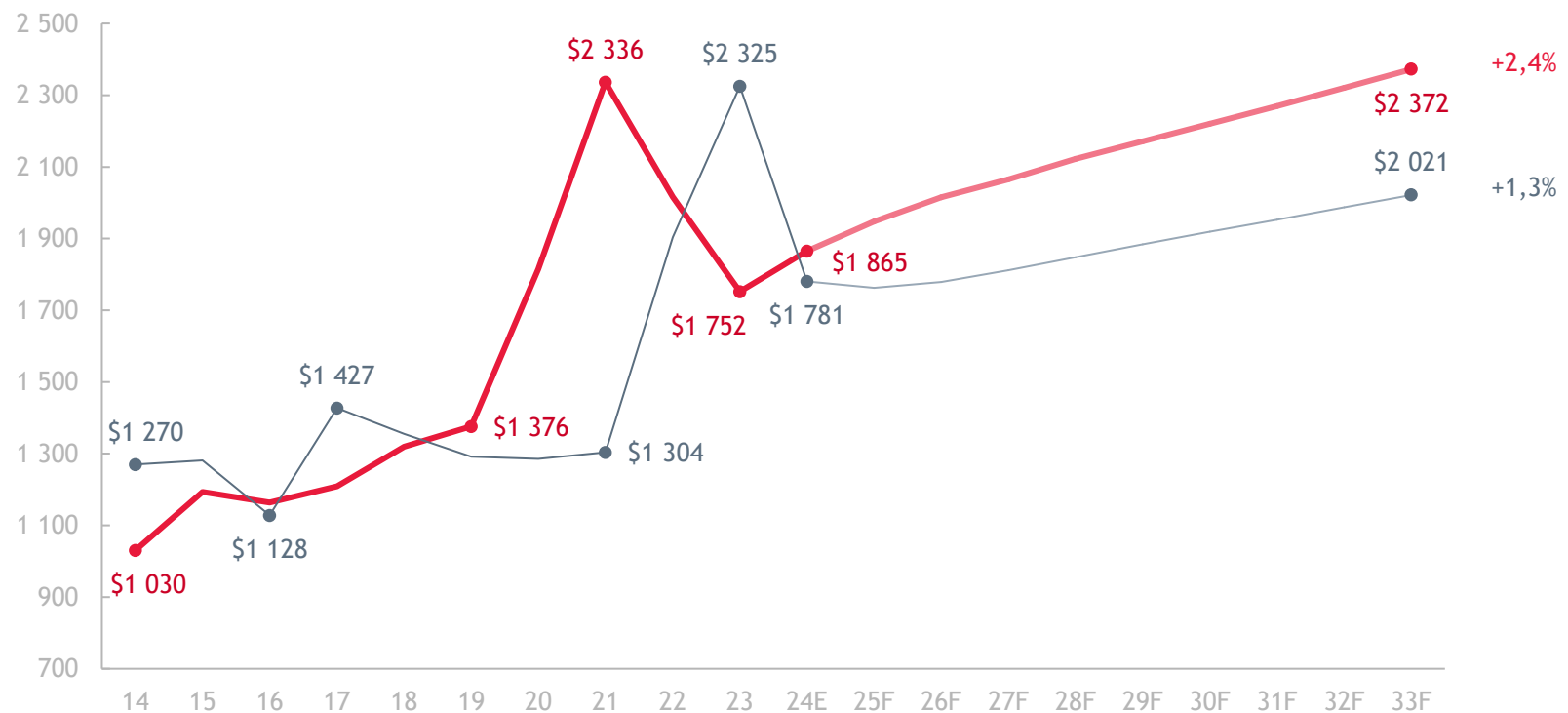


- ▶ In 2023, the egg prices in Ukraine were significantly lower than on the global market – by 25%. However, in 2024, the situation changed: the prices in Ukraine increased by +6.4% (from \$1 752 to \$1 865 per tonne), while the global prices decreased by -23.4% (from \$2 325 to \$1 781 per tonne).
- ▶ An increase in domestic prices can be caused by factors such as rising costs (animal feed, energy, general inflation) or an increased domestic demand.

Starting from 2024, **the price of eggs in Ukraine** is higher than the global price, which may be a sign of high production costs due to rising energy and logistics costs and, as a result, low attractiveness on international markets.

Dynamics of egg prices in Ukraine compared to the world average price (in \$ per tonne)

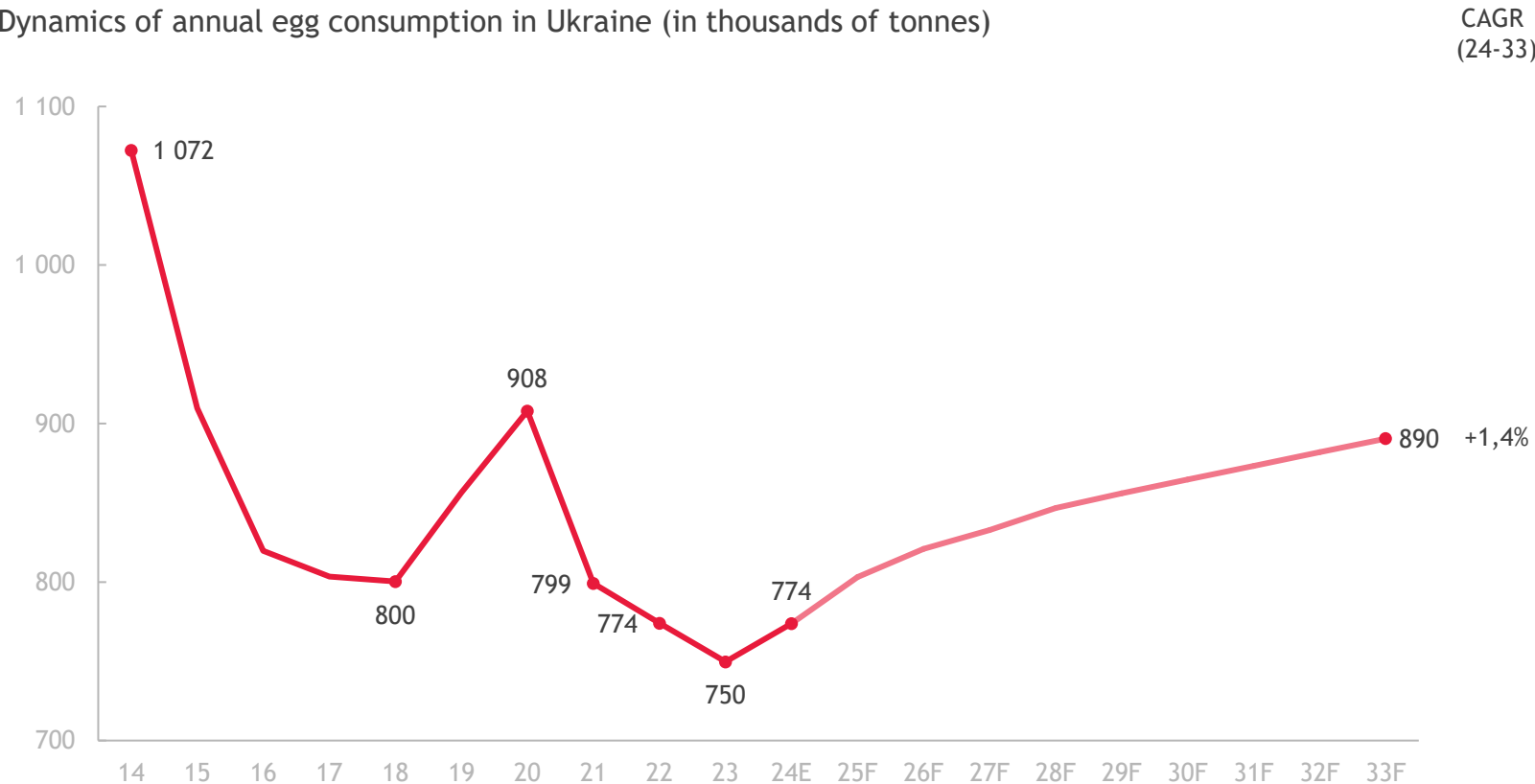
Ukraine | World



- ▶ At the end of 2021, the egg prices in Ukraine peaked at \$2 336 per tonne, almost doubling compared to 2020 (\$1 815 per tonne). In the period between 2022 and 2023, there was a decline of -13.7% and -13.1% to \$1 752 per tonne. The forecast to 2033 shows a steady price increase at an average annual rate of +2.4% CAGR to \$2 372 per tonne.
- ▶ The global egg prices peaked in 2023 at \$2 325 per tonne due to global crises, bird flu epidemics and logistical challenges. From 2024 to 2033, the price is expected to grow moderately by +1.3% CAGR to \$2 021 per tonne.
- ▶ In 2023, the price of eggs in Ukraine was 24.6% lower than the global price. However, starting in 2024, Ukrainian prices are expected to exceed global prices again, with the difference reaching 17.4% in 2033. This creates new challenges for exporters.

The anticipated annual growth of egg consumption in Ukraine by +1.4% (CAGR) to 890 thousand tonnes in 2033 demonstrates the stabilisation of the consumer market and the recovery of domestic demand, providing a solid basis for production planning.

Dynamics of annual egg consumption in Ukraine (in thousands of tonnes)

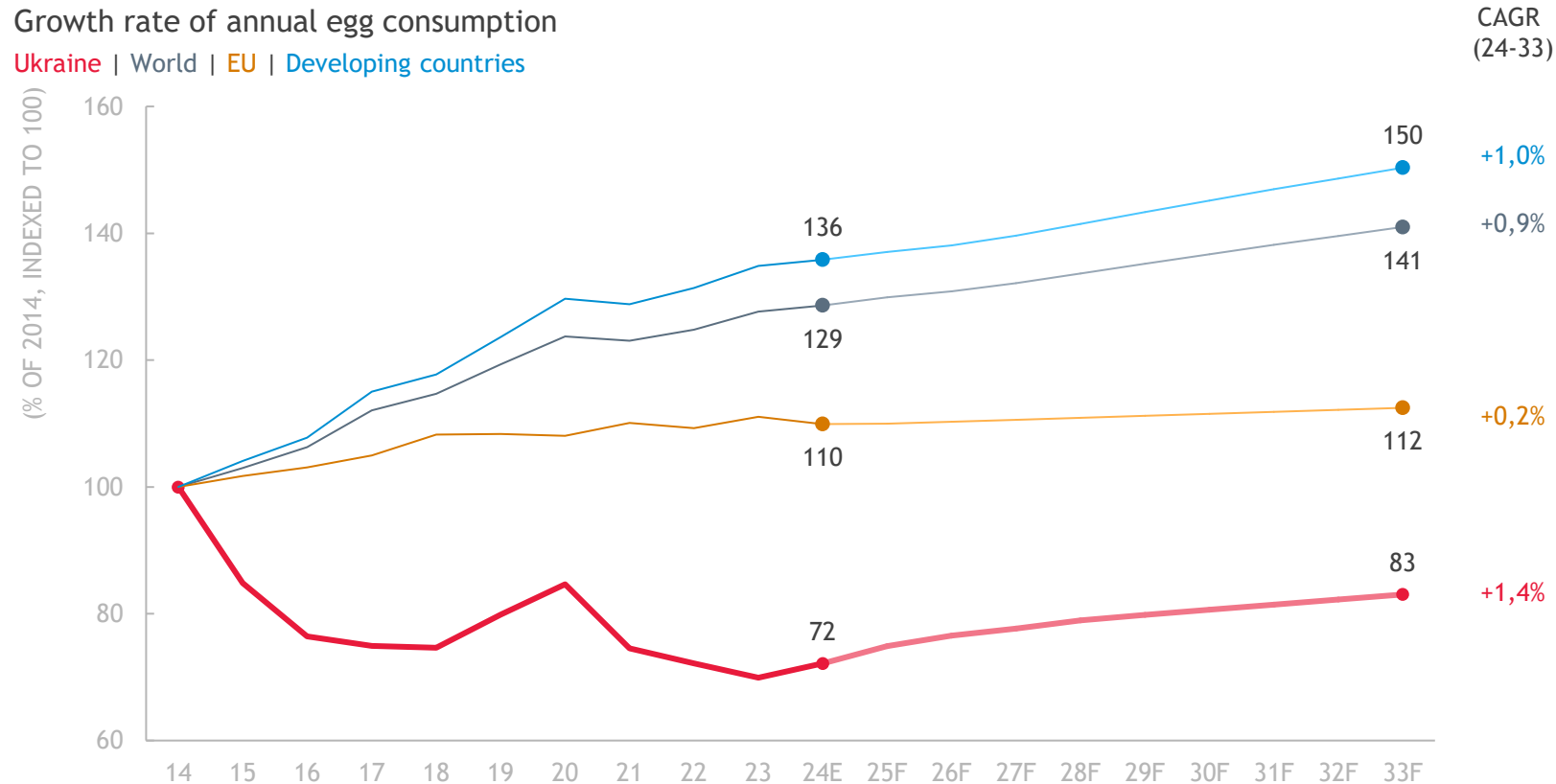


- ▶ The significant **decrease in egg consumption**, from 1 072 thousand tonnes in 2014 to 800 thousand tonnes in 2018 (-25%), can be attributed to a decline in the purchasing power of the population, a decrease in total production and demographic factors (migration, depopulation).
- ▶ The period of **growth to 908 thousand tonnes in 2020** is indicative of improved product availability and the possible impact of social programmes or increased domestic demand for cheaper protein sources.
- ▶ The decline to 750 thousand tonnes in 2022 is due to the outbreak of a full-scale war by the Russian Federation, logistical constraints, rising prices and lower incomes.

Despite the predicted recovery, Ukraine is performing far below the global trend in **annual egg consumption**, which creates both challenges and opportunities for businesses, the government and international partners.

Growth rate of annual egg consumption

Ukraine | World | EU | Developing countries

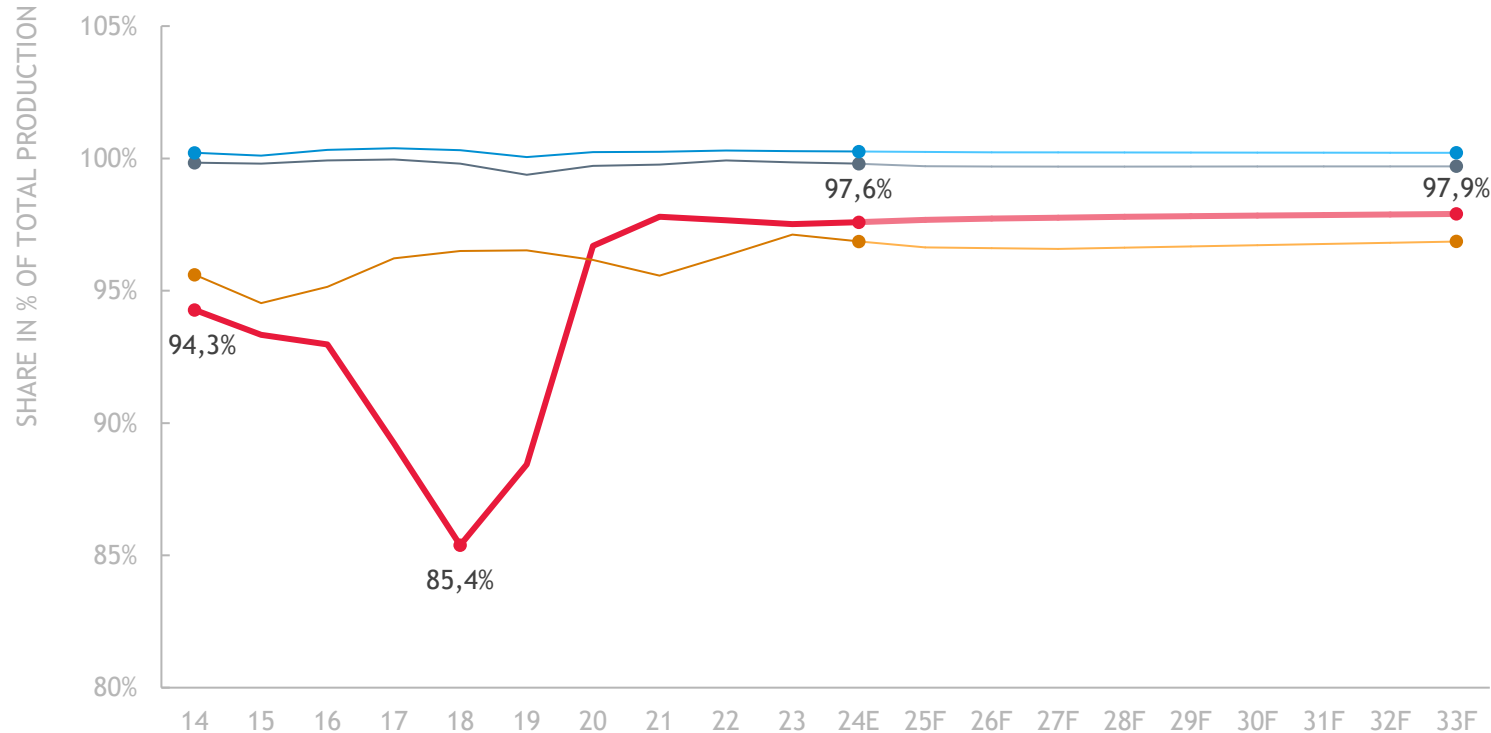


- ▶ **Ukraine demonstrates the deepest decline in egg consumption** among all groups: the index dropped from 100 in 2014 to 70 in 2023, a decrease of -30%. This sharp decline is attributed to a combination of economic challenges (2014-2015), war and migration (2022-2023), inflation and declining purchasing power.
- ▶ Despite the challenges posed by global issues, **the world continues to grow**. In 2023, the global index reached 128, and it is projected to reach 141 by 2033. This indicates a stable global trend of increasing animal protein consumption.
- ▶ **Emerging markets are driving global demand**: growth from 100 to 150 index points in 20 years, the highest rate of growth among all categories. The key reasons include urbanisation, rising incomes, improved logistics and availability of eggs.

Ukraine is restoring **the share of domestic consumption of eggs** in total production. This indicates the industry's focus on the domestic market and requires a revision of its export strategy.

Dynamics of annual egg consumption

Ukraine | World | EU | Developing countries

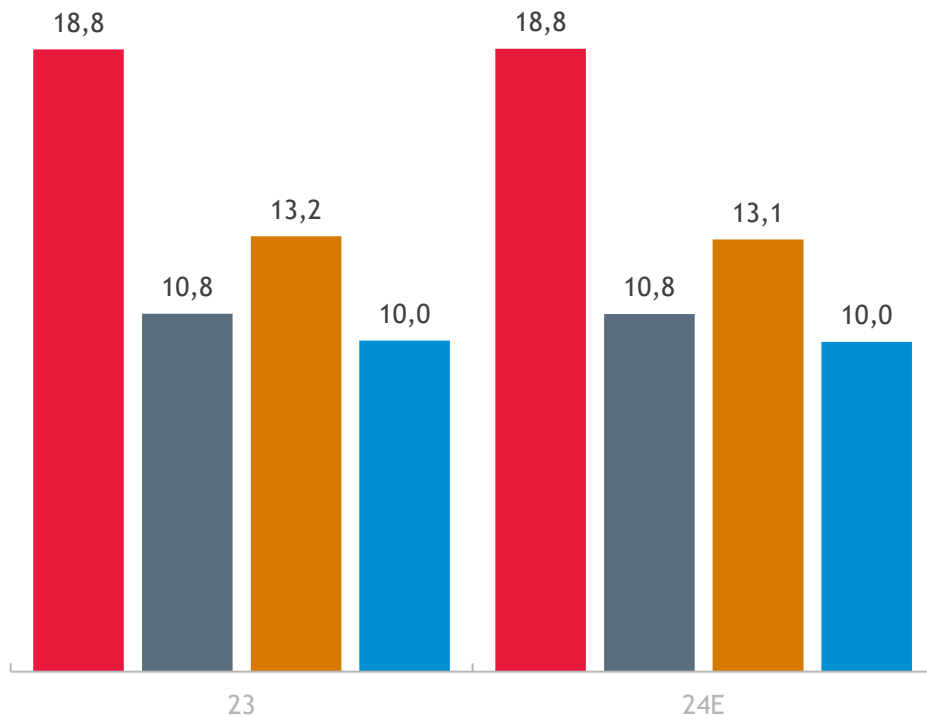


- ▶ The gradual increase in the share of domestic consumption of eggs in total production in Ukraine to 97.9% in 2033 indicates a decline in exports or their stagnation, which is confirmed by other analytical data.
- ▶ The total share of global consumption is stable at 99.7-99.9%. This suggests that the global egg market is not very mobile and international trade is limited.
- ▶ The value of about 96.6% indicates a higher role of exports in the structure of the European egg industry compared to other regions.
- ▶ The share of consumption in developing countries exceeds 100%, which means a shortage of domestic production and a need for imports. This presents opportunities, including for Ukrainian exports, provided they are competitively priced and certified.

Ukraine demonstrates the highest **level of egg consumption** among the regions compared, which demonstrates the high role of eggs in the diet of the population and the need to maintain the availability of this product.

Annual egg consumption (in kilograms per person)

Ukraine | World | EU | Developing countries

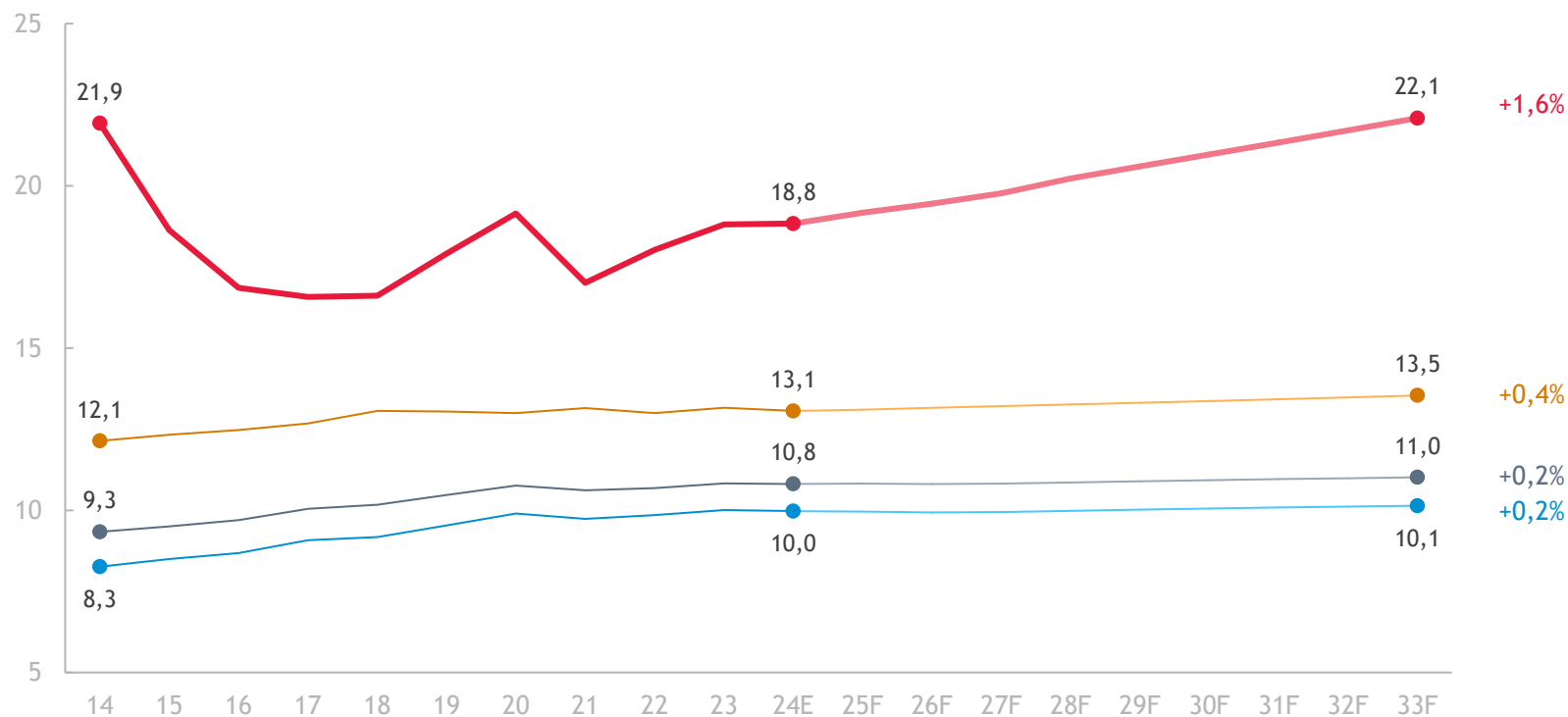


- ▶ Despite the challenges faced, **Ukrainians consumed almost 19 kilograms of eggs per person annually in 2023-2024**, which is **74% higher than the global level** and significantly higher than in the EU and developing countries. The unchanged figure between 2023 and 2024 (18.8 kilograms) underscores the role of eggs as a primary source of protein for the population, particularly in the context of rising meat and other protein product prices.
- ▶ In the European Union, the figure was 13.2 kilograms in 2023 and **decreased slightly in 2024 to 13.1 kilograms**. This suggests that the market has reached saturation, and there may be a partial replacement of eggs with alternative protein sources.
- ▶ **Developing countries** have the lowest consumption of **10 kilograms per person per year**, which is almost half that of Ukraine, creating significant potential for Ukrainian eggs to be exported to these markets with appropriate pricing.

Ukraine maintains its leadership in per capita egg consumption in Europe and globally, demonstrating a steady recovery in demand and laying the groundwork for further growth in the domestic market and export potential.

Dynamics of annual egg consumption (in kilograms per person)

Ukraine | World | EU | Developing countries



- ▶ In 2024, Ukrainians consumed an average of 18.8 kilograms of egg per person, which is almost double the global average (10.8 kilograms) and significantly higher than the EU average (13.2 kilograms). By 2033, this figure is expected to increase to 22.1 kilograms, which will exceed the peak value of 2014.
- ▶ Global consumption has been showing consistent fluctuations between 10.8 and 11.0 kilograms with a slight increase (CAGR +0.2%), suggesting either limited global demand or barriers to accessing products.
- ▶ The European Union is demonstrating moderate but steady growth (reaching 13.5 kilograms in 2033), with a CAGR of +0.4%. This reflects a sustainable consumption culture and a balanced supply.
- ▶ While the fundamental level of consumption in developing countries is currently modest (10 kilograms), the prospects for growth are high, creating opportunities for exports from Ukraine.



Egg production

Main conclusions

- ▶ Egg production in Ukraine decreased from 1 137 thousand tonnes in 2014 to 769 thousand tonnes in 2023 (-32%), after which a gradual increase to 910 thousand tonnes in 2033 is forecast. The primary factors contributing to this decrease include economic crises, the war, and a decline in the population's ability to pay. The recovery is expected to be slow and unstable.
- ▶ The volume of egg exports from Ukraine decreased from a peak of 141 thousand tonnes in 2018 to 20 thousand tonnes in 2024 and is forecast to remain at this level until 2033. This decline reflects the loss of foreign markets due to logistical difficulties, the war, and competition from other producers.
- ▶ The product price increased from \$1 030 per tonne in 2014 to \$1 865 in 2024. The main jump was recorded in 2020-2021, driven by inflation, devaluation and logistical challenges. The price of Ukrainian eggs remains competitive on the global market compared to the average global price (\$1 781 per tonne).
- ▶ Following a decrease in domestic consumption from 1 072 thousand tonnes in 2014 to 750 thousand tonnes by 2023, it is anticipated that there will be a gradual increase to 890 thousand tonnes by 2033. This is indicative of the population's ability to adapt to change, the continued preservation of eggs in the diet, and a partial recovery in the population's well-being.
- ▶ In 2024, Ukrainians consumed an average of 18.8 kilograms of eggs per year, and in 2033, it is expected to be 22.1 kilograms. This figure is almost double the global average. This indicates the sustainability of the culture of egg consumption as the main source of protein.
- ▶ Moderate price rises and steady domestic demand are anticipated in Ukraine. However, the stagnant state of exports indicates a need for a re-evaluation of the strategy, including the reconstruction of supply chains, the adaptation to the requirements of importers, and the promotion of Ukrainian products in new markets.



Valerii Afanasiev

Partner

Enterprise Appraisal
Director



Dmytro Korol

MRICS, Head of Business
Valuation and Financial
Modelling



Daria Bobyr

Appraiser

Business Valuation and
Financial Modelling



Yuliia Sotnyk

Analyst

Business Valuation and
Financial Modelling

CONTACTS

Kyiv:

201/203, Kharkivske Road,
10th floor

☎ +380 44 393 26 87 88

📠 +380 44 393 26 91

Dnipro:

4 Andriia Fabra st.,
6th floor

☎ +380 56 370 30 43

📠 +380 56 370 30 45

Lviv:

120 Shevchenko st.,
Regus-KIVSH

☎ +38 032 242 44 00

✉ info@bdo.ua

🌐 www.bdo.ua



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