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Market Trends and Exports/Imports

China Emerges as a Strong Competitor to Thailand in Chicken Exports

Export Shift: China is rapidly strengthening its position as a major poultry exporter and is expected to challenge Thailand's leadership in Asian chicken exports, driven by rapid expansion of its poultry industry.
Trade Trends: China's chicken imports are projected to decline by 36%, while exports have increased by 50%, continuing the strong growth seen in the previous year.
Price Advantage: Chinese chicken breast meat is reported to be at least US$1,000 per ton cheaper than comparable products from Brazil and Thailand, giving Chinese exporters a significant pricing advantage.
Competitive Driver: Weak domestic demand for chicken breast meat in China enables producers to export surplus volumes at lower prices, enhancing their competitiveness in international markets.
Regional Implication: The growing competitiveness of Chinese poultry exports is expected to intensify price competition for established exporters, particularly Thailand, in key international markets.
Source: Asian Agribiz

Liquidity Pressures Deepen Indonesian Poultry Farmers' Losses

Rising Financial Strain: Indonesian poultry farmers continue to incur losses as live bird prices (US$0.83–0.94/kg) remain well below the estimated production cost of US$1.22/kg.
Liquidity Challenges: Changes in the procurement of imported feed ingredients, including a cash-before-delivery payment system, have increased working capital requirements for feed manufacturers, tightening cash flow across the supply chain.
Impact on Farmers: Medium- and small-scale feed mills are demanding faster payments, forcing many farmers to sell birds before they reach optimal market weight to cover feed, chick, medicine, and operating costs.
Market Consequences: Premature sales have triggered panic selling, weakened farmers' bargaining power, and further depressed live bird prices.
Industry Outlook: Continued financial losses could drive many independent poultry farmers out of the industry, while large integrated poultry companies are expected to be more resilient under current market conditions.
Source: Asian Agribiz

Thai Chicken Exports Decline for Fifth Consecutive Month

Export Performance: Thailand's exports of fresh, chilled, and frozen chicken fell for the fifth consecutive month in May, declining 26.2% year-on-year to US$100 million.
Year-to-Date Trend: Chicken exports during the first five months of 2026 decreased 20.1% year-on-year to US$489.1 million.
Market Performance: Exports declined to Japan, Malaysia, and China, while shipments increased to South Korea, the Netherlands, and Singapore.
Key Drivers: The sharp decline was mainly due to reduced exports to Japan, Thailand's largest chicken export market. Thai exporters also face stronger price competition from Chinese producers, who benefit from lower production costs, while the weaker Japanese yen has increased import costs for Japanese buyers.
Source: Asian Agribiz

Indonesia Expands Poultry Exports to New Markets

New Export Destinations: Indonesia expanded its poultry export reach with shipments of 21,800 hatching eggs (1.6 tons) to Myanmar and 17.9 tons of chicken carcasses and processed poultry products to Timor-Leste.
Industry Competitiveness: The Ministry of Agriculture stated that these exports reflect the growing competitiveness of Indonesia's poultry sector and its ability to capture new international market opportunities.
Strong Domestic Supply: Indonesia recorded a 2025 surplus of approximately 252,000 tons of chicken meat and 92,000 tons of eggs, providing a solid foundation for export growth.
Export Growth: The country's livestock exports increased by 10.65% year-on-year to approximately US$1.32 billion.
Industry Milestone: ISA Indonesia described the Myanmar shipment as its first export in 23 years, marking a significant step in the company's international expansion.
Source: Asian Agribiz

Market Trends and Exports/Imports (Cont.)

Pakistan Poultry Industry Receives No Tax Relief in 2026–27 Budget

No Budget Relief: Pakistan's 2026–27 federal budget retains the PKR 10 Federal Excise Duty (FED) per day-old chick and 18% sales tax on processed chicken, despite industry requests for tax reductions.
Industry Concerns: The Pakistan Poultry Association (PPA) warned that the existing tax structure discourages investment, reduces the competitiveness of poultry exports, raises consumer prices, and threatens long-term food security.
Higher Production Costs: Import duties and sales taxes on key feed ingredients—including soybean meal, amino acids, vitamins, and minerals—continue to increase production costs. Feed accounts for 60–70% of total poultry production costs.
Investment Impact: The PPA stated that the tax on processed chicken discourages investment in modern processing facilities and value-added poultry products, while the FED on day-old chicks adds unnecessary costs throughout the production chain.
Industry Growth: Despite these challenges, Pakistan's poultry sector has expanded significantly, with chicken production exceeding 2.36 million metric tons in 2024, up from 1.52 million metric tons in 2019, while egg production reached nearly 1.19 million metric tons.
Source: WATT Poultry

Feed and Nutrition

Malaysia Warns of Rising Feed and Fertiliser Costs Amid Energy Crisis

Feed Cost Impact: Livestock feed prices are projected to increase by 8%, while fertiliser costs are expected to rise by 15–20% due to continued global energy market disruptions.
Food Security Measures: The Malaysian government is strengthening food security initiatives, with adequate stocks of rice (5–6 months) and at least one month of supply for chicken, fish, fruit, milk, and eggs.
Government Response: A national task force has introduced 120 intervention measures to address the energy crisis, with 27 measures already implemented, including fuel subsidy adjustments and financial support for SMEs.
Outlook: Energy markets are expected to begin stabilising in Q3 2026, although price and supply volatility may persist for the next one to two years.
Source: The Poultry Site

Bounty Fresh Supports Higher Philippine Corn Import Quota to Reduce Feed Costs

Support for Higher Corn Imports: Bounty Fresh Group has endorsed the Philippine Department of Agriculture's proposal to increase the corn import Minimum Access Volume from 216,940 metric tons to 500,000 metric tons.
Feed Cost Relief: The company stated that greater access to imported corn would help lower feed costs, supporting more affordable poultry production and helping contain rising food prices.
Inflation Concern: The proposal comes as the Philippines' 2026 inflation forecast has been raised to 6.4%, significantly above the central bank's target range of 2–4%, increasing pressure to keep food prices under control.
Industry Recommendation: Bounty Fresh urged that MAV allocations be prioritised for companies actively producing chicken, ensuring imported corn directly benefits poultry production and strengthens domestic food secursity.
Food Security: The company warned that insufficient support for poultry producers could negatively affect the country's overall food supply.
Source: eFeedLink

Sustainability and Welfare

Ho Chi Minh City Launches Digital Poultry Traceability Plan

Digital Traceability: Ho Chi Minh City will implement a 2026–2030 digital traceability system covering poultry meat and eggs from farm to retail.
Food Safety: A centralized database linked to Vietnam's national traceability portal will improve product verification, food safety, and supply chain oversight.
Industry Benefits: The initiative aims to strengthen product quality, consumer confidence, and export opportunities, while enabling faster recalls and stricter enforcement against non-compliant products.
Source: aviNews