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Market Trends and Exports/Imports

Indonesia Introduces New DOC Rules to Support Fair Access and Stable Poultry Prices

New regulation: Effective 1 January 2027, poultry breeding companies must allocate at least 50% of final stock DOC to external customers, while limiting internal distribution to a maximum of 50%.
Objective: The policy aims to improve DOC availability, balance supply and demand, reduce prolonged price fluctuations, and create a more competitive poultry industry.
Next steps: The government plans to incorporate the regulation into national legislation to strengthen long-term industry sustainability and protect independent farmers.
Industry view: The Poultry Breeding Companies Association (GPPU) called for better coordination across breeding, processing, and marketing to improve distribution efficiency and maintain stable poultry prices.
Source: Asian Agribiz

Indian Poultry Industry to Make Profits Despite Higher Feed Costs

Positive outlook: Crisil Ratings forecasts the Indian poultry industry's revenue to recover by 10% this fiscal year, supported by stronger demand and improved egg and broiler prices.
Feed cost pressure: Feed, accounting for 60–65% of production costs, is expected to increase by 3–5% to around US$0.79/kg, driven by higher corn prices and geopolitical risks affecting imported feed ingredients.
Egg sector leads growth: Eggs, contributing nearly 60% of the industry's total value, are expected to achieve 9–11% revenue growth, with prices projected at US$0.05–0.06/egg.
Broiler performance: Broiler revenue is forecast to increase by 8–10%, supported by a 2–4% rise in production volume as rural demand and preference for high-protein foods continue to grow.
Source: Asian Agribiz

Vietnam's H1 Chicken Imports Near 200,000 Tonnes as US Supplies Dominate; Exports Open South Korea

Imports surge: Vietnam imported an estimated 185,000–195,000 tonnes of chicken meat worth US$190–205 million in H1 2026, representing a 26–37.6% increase year-on-year.
US remains top supplier: The US supplied 115,000–120,000 tonnes (around 61.8% of imports), mainly low-cost chicken leg quarters. The EU supplied 28,000–30,000 tonnes, led by Poland, while Brazil contributed 24,000–26,000 tonnes (around 13.1%).
Import mix: Frozen chicken thighs accounted for 130,000–140,000 tonnes (approximately 71.5% of imports), followed by frozen wings at 22,000–25,000 tonnes (around 12%) and chicken feet and by-products at 8.7%.
Domestic impact: The Vietnam Poultry Association said tariff reductions under free trade agreements have increased the competitiveness of imported chicken, particularly low-priced cuts that compete directly with locally produced white chickens, adding pressure to domestic producers facing oversupply.
Exports expand: Vietnam exported 4,800–5,200 tonnes of poultry meat worth US$45–48 million in H1 2026. Processed chicken contributed over 85% of export value, with Japan accounting for more than 50% of exports. Since April 2026, Vietnam has also begun exporting processed chicken to South Korea, expanding its export market.
Source: eFeedLink

Philippine Meat Imports Rise, with Poultry Posting Highest Growth

Imports increase: Philippine meat imports rose 33% year-on-year to 872,275 tons in H1 2026, reflecting continued reliance on imported meat to meet domestic demand.
Poultry leads growth: Chicken was the fastest-growing meat category, with imports reaching 291,497 tons (+13.9%). This included 170,054 tons of mechanically deboned meat (+12.6%), 54,461 tons of leg quarters (+14.7%), and 47,007 tons of chicken cuts (+15.2%).
Major suppliers: Brazil remained the largest chicken supplier with 167,384 tons, followed by the US (78,515 tons), Australia (7,485 tons), and Canada (6,619 tons).
Pork remains dominant: Pork imports totaled 455,382 tons, supported by the government's decision to increase the minimum access volume (MAV) for pork imports by nearly 280% to 204,210 tons, as domestic production continues to recover from African swine fever (ASF).
Source: aviNews

Market Trends and Exports/Imports (Cont.)

Brazil Has a Positive Outlook for Poultry in 2026 and 2027

Production growth: Brazil's chicken meat production is projected to increase by up to 5.6% in 2026, while egg production is expected to grow by up to 4.1%, supported by stable production costs and ample grain supplies.
Export expansion: Chicken meat exports could rise 10.3% to 5.875 million MT in 2026, up from 5.324 million MT in 2025. Domestic chicken meat availability is also forecast to increase 3.1% to 10.275 million MT from 9.965 million MT last year.
Favorable market conditions: The Brazilian Animal Protein Association (ABPA) attributed the positive outlook to a stable Brazilian real, declining production costs since 2022, strong corn and soybean supplies, and the absence of highly pathogenic avian influenza (HPAI) in commercial poultry flocks.
2027 outlook: ABPA projects continued growth in 2027, with chicken meat production reaching 16.6 million MT (+2.8%) and exports increasing to 6.05 million MT (+3%). Europe's production challenges from heatwaves and wildfires may also support demand for Brazilian poultry.
Source: WATTPoultry

Feed and Nutrition

Lower Feed Costs Offer Relief for Vietnam Farmers

Feed price reductions: Major feed manufacturers in Vietnam have lowered prices for livestock and poultry feed, helping ease production costs for farmers amid ongoing margin pressures.
Leading producers involved: Companies announcing price cuts include CP Vietnam, De Heus, Greenfeed, Japfa, Dabaco, ANT, Haid, and Tongwei, with reductions applied across a range of livestock and poultry feed products.
Extent of reductions: Many pig and poultry feed products were reduced by approximately US$7.54 per ton, although the actual adjustments varied by company and product line. Layer feed generally recorded smaller price reductions.
Global grain market support: The lower feed prices were driven by favorable global grain supplies, with large corn and soybean harvests in Brazil and the US helping to keep international feed ingredient prices relatively stable.
Import price trends: During the first four months of 2026, Vietnam's average imported corn price declined 3.6% year-on-year to US$248/ton, while the average soybean import price increased 5.2% to US$476/ton, reflecting differing market dynamics for the two key feed ingredients.
Industry impact: Reduced feed costs are expected to improve profitability for poultry and livestock producers, as feed remains the largest component of production costs. Lower input costs may also support increased production if favorable grain market conditions continue.
Source: Asian Agribiz

Vaccination and Disease Prevention

Vietnam Pushes Urgent Avian Influenza Vaccination Amid Active Outbreaks

Disease situation: Vietnam has recorded 80 avian influenza outbreaks across 17 provinces and cities this year, resulting in more than 349,400 birds dying or being culled. Twenty-six outbreaks remain active in nine provinces and cities.
Low vaccine coverage: During the first 2026 vaccination campaign, only 127 million of the targeted 247 million birds were vaccinated, achieving just over 51% coverage.
Key risk factors: Authorities attributed the continued disease risk to low vaccination rates, widespread small-scale farming, and frequent poultry trading, transport, and slaughter activities.
Government response: The Department of Livestock Production and Animal Health urged local authorities to accelerate vaccination, strengthen surveillance at high-risk locations such as live-bird markets, and ensure vaccines are matched to circulating virus strains.
Source: Asian Agribiz

Additional Highlight

ACI Godrej and Aftab Fined for Quality Certification Breach

Regulatory enforcement: Bangladesh's Bangladesh Standards and Testing Institution (BSTI) fined ACI Godrej Agrovet Pvt. Ltd. and Aftab Feed Products Ltd. for producing and selling poultry and fish feed without mandatory quality certification and packaging registration.
Penalties: Each company was fined US$3,235 following three mobile court operations conducted on 26 July in Rupganj (Narayanganj), Basila, and Hazaribagh (Dhaka).
Source: Asian Agribiz