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Market Trends and Exports/Imports

Thailand's Chicken Exports Forecast to Decline for the First Time in 20 Years

Export Outlook: Thailand's chilled and frozen chicken exports are projected to reach US$1.255 billion in 2026, a 13% year-on-year decline, marking the first annual drop in two decades. Exports during the first five months of 2026 had already fallen 20% compared to the same period last year.

China Import Suspension: The decline is largely driven by China's suspension of imports from 17 of Thailand's 22 approved poultry processing plants after authorities found reported export volumes exceeded production capacity. The restrictions have been in place since July 2025.

Market Impact: China, currently Thailand's third-largest market for chilled and frozen chicken (16% of exports), had previously accounted for as much as 37% of exports in 2023. The suspension has significantly weakened Thailand's export performance amid softer global demand and strong price competition.

Changing Export Markets: While exports to Japan and China are expected to continue declining, shipments to Malaysia, South Korea, and Hong Kong are forecast to remain resilient. Thai exporters are also targeting the Netherlands and South Africa, although these markets are unlikely to fully compensate for losses in China.

Recovery Efforts: Thailand and China have agreed on a draft protocol for poultry meat exports, which is awaiting formal signing. Thai processing plants are working to meet the new requirements, with exports expected to gradually recover once approvals are reinstated.

Source: Asian Agribiz

Indonesia Targets Saudi Arabia and China to Expand Poultry Exports

Export Strategy: Indonesia is seeking to expand chicken meat and egg exports to Saudi Arabia and China to reduce domestic oversupply and diversify export markets.

Production Surplus: The country has achieved self-sufficiency and is now producing more than domestic demand. As of March 2026, broiler meat production reached 4.29 million tons versus consumption of 4.12 million tons, while egg production totaled 6.54 million tons against consumption of 6.47 million tons.

Target Markets: Saudi Arabia is viewed as a promising market due to demand for food supplies serving Indonesian Hajj and Umrah pilgrims, while China presents opportunities for exports of chicken feet, a product with strong consumer demand.

Growing Export Performance: Indonesia currently exports poultry products to 11 countries. In March 2026, exports reached 545 tons valued at IDR 18.2 billion, including 517 tons of consumer eggs (approximately 8.13 million eggs), with the remainder consisting of chicken meat and processed poultry products.

Positive Growth Trend: Poultry exports have increased steadily, rising from 300 tons (IDR 11 billion) in 2024 to 400 tons (IDR 15 billion) in 2025, with further growth recorded in 2026.

Government Support: The Ministry of Agriculture is actively promoting poultry exports through trade missions and market access initiatives to strengthen Indonesia's presence in international markets.

Source: aviNews

Pakistan's DOC Oversupply Intensifies Pressure from Federal Excise Duty

Industry Challenge: Pakistan's poultry breeding and hatching sector is facing a severe oversupply of day-old chicks (DOCs), causing market prices to collapse well below production costs.

Tax Burden: The Pakistan Poultry Association (PPA) has urged authorities to reconsider the fixed Federal Excise Duty (FED) of US$0.03 per chick, arguing that it is no longer sustainable under current market conditions.

Price vs. Cost: DOC prices have reportedly fallen to around US$0.01 per chick, while production costs remain between US$0.32–0.36 per chick, resulting in significant financial losses for hatcheries.

Industry Proposal: The PPA recommends replacing the fixed levy with an ad valorem tax of 5% of the supply value, making the tax more responsive to volatile market prices.

Operational Impact: Due to weak demand, hatcheries are being forced to destroy unsold chicks despite substantial investments in breeder flocks, feed, biosecurity, labor, and other production inputs. While regulations permit supervised destruction, the industry argues this does not address the underlying economic issue.

Source: Asian Agribiz

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Market Trends and Exports/Imports (Cont.)

US Becomes Vietnam's Largest Poultry Supplier

Market Leader: The US was Vietnam's largest poultry supplier in 2025, exporting US$113 million worth of poultry products, ahead of South Korea (US$75 million) and the EU (US$65 million).

Tariff Reduction: Vietnam reduced the import tariff on frozen chicken thighs from 20% to 15%, a move expected to further boost US poultry exports.

Import Trends: US exports mainly consist of frozen chicken legs and leg quarters, with imported poultry accounting for about 11% of Vietnam's chicken consumption.

Trade Outlook: Ongoing US–Vietnam trade negotiations could further improve market access, with Vietnam proposing to eliminate tariffs on most goods, including agricultural products.

Source: eFeedLink

Feed and Nutrition

Indonesia's Corn Reserves Remain Below Target

Low Procurement: As of 6 July 2026, Indonesia's government corn reserves reached 190,000 tons, only 19% of the 1 million-ton target. In 2025, procurement achieved just 10% of the target.

Government Response: Bappenas is pushing to accelerate procurement, improve pricing and drying policies, optimize reserve distribution for food and feed, and increase reserve targets for 2027.

Industry Impact: Higher corn reserves are expected to strengthen feed supply security and stabilize corn prices for the livestock and poultry sector.

Source: aviNews

Vaccination and Disease Prevention

BAI Assumes Licensing Authority for Veterinary Medicines in the Philippines

Regulatory Change: The Philippine Department of Agriculture (DA) has officially transferred the licensing and registration of veterinary medicines, biologics, and animal health products from the Food and Drug Administration (FDA) to the Bureau of Animal Industry (BAI) through a circular issued on 8 July.

Transition Guidelines: The circular establishes procedures for issuing Licenses to Operate (LTOs) and Certificates of Veterinary Product Registration (CVPRs) for retailers of veterinary medicines and other animal health products.

Validity of Existing Licenses: Existing FDA-issued licenses and registrations will remain valid until their expiration, provided there are no regulatory violations.

Expected Benefits: The DA expects BAI's specialized expertise in animal health and biologics to streamline and accelerate the approval process for veterinary products, improving access to essential animal health solutions.

Source: Asian Agribiz

Additional Highlight

Three Forces Reshaping the Global Livestock Industry

Emergence of Two Global Markets: The livestock industry is splitting into two trade ecosystems: Chinese suppliers are expanding across Asia with competitively priced technologies, while Western markets are becoming more selective due to geopolitical, regulatory, and supply chain concerns.

Industry Consolidation Accelerates: Rising R&D costs, stricter regulatory compliance, technological complexity, and the need for broader service networks are driving consolidation across the animal health, feed additive, equipment, and integrated livestock sectors. Larger companies are gaining competitive advantages through scale, although smaller firms remain important sources of innovation and niche expertise.

Renewed Focus on Practical Value: Producers are prioritizing technologies that deliver measurable operational benefits rather than futuristic concepts. With continued pressure from volatile feed costs, labor shortages, disease risks, sustainability requirements, and tighter margins, investment decisions are increasingly based on improvements in efficiency, productivity, and profitability.

Implications for Asia: Asian poultry and livestock businesses are expected to place greater emphasis on strategic partnerships, operational efficiency, and balanced sourcing strategies as the industry adapts to changing global trade dynamics and ongoing consolidation.

Source: Asian Agribiz