

Broiler & Breeder News Asia

7 - 13 Jan 2026

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Market Trends and Exports/Imports

EXPORT

Strong Export Demand Benefits Thailand's Poultry Industry

Production Outlook: Thailand's poultry production is forecast to grow by 2-2.5% in 2026, supported by robust export demand.

Export Growth: Poultry exports are expected to increase by 4-4.5%, outperforming production growth, according to Rabobank.

Key Markets: Strong shipments to the UK and EU in 2025 sustained high chicken prices, while exports to Japan, particularly raw chicken, showed modest gains.

Competitive Landscape: Global competition remains intense, with Brazil regaining strength in raw chicken exports and China becoming more price-competitive in processed poultry.

Domestic Challenges: Thailand's local market remains weak due to slow economic growth, underperforming tourism, and price pressure from low-cost pork and shrimp, limiting domestic chicken consumption growth.

Source: [Asian Agribiz](#)



2025 Poultry Market Strength Signals Positive 2026

Global Outlook: Strong consumer demand and low feed costs (corn and soymeal down ~10% in late 2025) supported global profitability. Despite HPAI and trade disruptions, the poultry sector enters 2026 with a solid 2.5-2.8% growth outlook, continuing to gain share of plate as high beef prices and tight egg supplies favor chicken.

Growth Trends: Rabobank raised its 2025 global growth forecast to 2.8%, with Asia leading expansion, particularly China (+7% in H1) and strong growth in Indonesia, Türkiye, Vietnam, Saudi Arabia, and the Philippines.

Trade Shifts: Global poultry trade rose 1% YOY in Q2, with exports increasing from Thailand, Russia, China, Ukraine, and Türkiye, while Brazil, the EU, and the U.S. saw declines due to HPAI and trade tensions.

Regional Highlights:

- United States:** Production increased 1.7% in 2025, driven by higher slaughter numbers and heavier bird weights. Strong chicken prices and low feed costs supported margins, though rising output may pressure prices in 2026. Exports showed modest recovery in mid-2025.
- China:** Broiler production expanded 7% in H1 2025, supported by lower feed costs and reduced imports. Imports fell sharply due to bans and higher tariffs, while exports surged 33% YOY, raising oversupply risks despite continued investment.
- Brazil:** Recovering from 2025 HPAI market losses, Brazil is regaining full access to China and the EU. With feed costs at their lowest since 2020 and a weak currency, 2026 production is forecast to hit 15.8 million metric tons (+3%).
- European Union:** Supply remains tight due to significant avian influenza outbreaks and parent stock culling in Central Europe. Combined with restricted imports from Ukraine and Brazil in 2025, this pushed breast meat prices to record highs—a trend expected to persist until the production cycle resets in early-to-mid 2026.

2026 Outlook: Trade expected to remain strong but volatile, with U.S. and Brazil likely to regain export momentum, while low feed costs continue to underpin industry margins.

Source: [WATT Poultry](#)



Vietnam Confirms Sufficient Livestock Supplies Ahead of Tet 2026

Supply Outlook: Vietnam's Ministry of Agriculture and Environment confirmed adequate livestock product supplies to meet Tet 2026 demand, despite a projected 5-10% seasonal increase in consumption.

Production Levels: Prepared supplies include 8.66 million tonnes of meat, 21.4 billion poultry eggs, and 1.3 million tonnes of milk; average monthly meat output in 2025 rose 1.6% YOY.

Price Stability: Livestock prices are expected to remain broadly stable; pork prices may rise slightly but are forecast to stay manageable, with live hog prices around ₫70,000/kg (US\$2.66).

Disease Control: Nationwide vaccination, disease prevention, and herd replenishment programs are in place to support supply stability.

Export Performance: Livestock and feed exports reached US\$2.1 billion in 2025 (+17.4% YOY), while total agro-forestry-fisheries exports hit a record US\$70.09 billion (+12% YOY).

Source: [eFeedLink](#)

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Feed and Nutrition

Indonesia Shifts Soybean Feed Imports Under State Oversight

IMPORT

Policy Change: Indonesia has transferred authority for importing soybeans and soybean meal (SBM)—key animal feed ingredients—to a state-owned enterprise to centralize control.

Drivers: Rising feed demand linked to the Free Nutritious Meals (MBG) program and expansion in poultry, dairy, and beef cattle populations.

Implementation: State-owned company Berdikari will manage SBM (and wheat) imports, coordinating with industry players and associations to ensure smooth supply during the transition.

Objectives: Improve governance, price stability, and supply security, with closer collaboration across the supply chain, including independent farmers.

Source: [Asian Agribiz](#)



US Soy Optimistic After a Turbulent Year of Tariffs and Trade Deals

Outlook: US Soy remains confident despite 2025 trade disruptions, supported by renewed trade signals and diversified export markets.

China Deal: China agreed to buy 12 mt by Feb 2026 and 25 mt/year for three years, reinforcing market confidence.

Market Diversification: Exports to non-China markets rose 30% yoy, with strong growth in MENASA and South Asia.

Regional Highlights: Pakistan (2.4 mt forecast imports), Bangladesh (USD 1.25bn purchase commitment), and Sri Lanka (strong preference for US soybean meal in poultry feed).

Product Advantage: US soybeans offer higher digestible protein, lower carbon footprint, and sustainability credentials ("four D's").

Source: [Asian Agribiz](#)

Sustainability and Welfare



Black Soldier Fly Larvae and Chicken Manure Conversion

Innovation: Black soldier fly (BSF) larvae can efficiently convert chicken manure into valuable by-products, including protein-rich biomass for feed and organic fertilizer (frass).

Bioconversion Benefits: Larvae reduce manure volume and odor, reshape microbial communities, and can lower harmful bacteria; additives (e.g., fruit fermentation liquids) further improve efficiency and gut health.

Safety Considerations: Key risks include pathogens, antimicrobial resistance genes (ARGs), and potential heavy metal bioaccumulation, requiring strict monitoring and controlled conditions.

Environmental Impact: Supports a circular economy, reduces greenhouse gas emissions versus untreated manure, and improves soil fertility through nutrient-rich frass.

Conclusion: With proper oversight, BSF larvae offer a promising, sustainable solution for poultry manure management while addressing safety risks.

Source: [aviNews](#)

Avian Influenza and Disease Outbreaks



Kerala, India Confirms New Avian Influenza Infections

Outbreaks: 11 new H5N1 avian influenza outbreaks confirmed in Kerala, with cases ongoing since December 9.

Impact on Poultry: 84,389 birds affected, including 54,100 deaths and 30,289 birds culled, based on WOAH reports.

Heightened Surveillance: Neighboring Tamil Nadu, especially Namakkal (India's key egg hub), has increased farm-level monitoring following past outbreaks.

National Context: Avian influenza remains widespread in India, with 10 states impacted last year, including major poultry regions such as Andhra Pradesh, Tamil Nadu, Maharashtra, and Uttar Pradesh.

Source: [Asian Agribiz](#)