

Broiler & Breeder News Asia

3 - 9 Dec 2025

Disclaimer: This Broiler & Breeder News Asia summarizes information from independent third-party publications. Aviagen does not endorse or promote any companies, products, or technologies mentioned, and all views and claims belong solely to the original sources.

Market Trends and Exports/Imports



Vietnam's Poultry Sector Stands Firm Amid Feed Market Volatility

Strong Growth: Poultry flock up 3.7% in 2025, contrasting with ASF-driven declines in swine. Consumer shift from pork to poultry supports stable demand and prices.

Feed Imports: Corn imports reached 6.86 mt and DDGS imports rose 10% (Jan–Aug 2025), with the US increasing its share. Competitive ingredient prices are easing production costs.

Opportunities: Rising tourism and a regional move away from red meat are boosting demand for poultry products and supporting potential export growth.

Feed Demand: Projected at 28.3 mt in 2025 and 29.2 mt in 2026, driven by poultry and aquaculture. Poultry expansion benefits from lower corn and DDGS prices.

Cost Risks: Heavy reliance on imported feed ingredients keeps producers vulnerable to global market volatility.

Disease Pressure: AI remains a threat, but farms with strong biosecurity report stable production.

Source: [aviNews](#)



Zero Tariffs Threaten Indonesia's Poultry Farmers

Policy Impact: Indonesia's agreement to remove import duties on US agricultural products—especially chicken leg quarters (CLQ)—poses a major threat to small-scale poultry farmers.

Farmer Vulnerability: For every 100,000 tons of imported CLQ, an estimated 4,350 micro and small farmers could lose their livelihoods. Farmers are already burdened by high chick and feed costs and unstable farm-gate prices.

Price Disparity: US CLQ enters Indonesia at just USD 0.36/kg, while local products cost around USD 0.90/kg. Feed ingredients are also far cheaper in the US (corn at USD 0.12/kg versus Indonesia's USD 0.44/kg).

Sector Risk: Unrestricted imports could trigger additional exporting countries to enter the market, potentially creating a severe crisis for Indonesia's poultry industry.

Source: [Asian Agribiz](#)



Brazilian Chicken Exports Expected to Edge Higher in 2025

Export Outlook: Agribiz forecasts chicken exports rising up to 0.5% to 5.32 million tons in 2025.

Key Context:

- Brazil avoided major trade bans after successfully controlling a bird flu outbreak in Rio Grande do Sul within a month.
- Initial 2025 projections were higher (up to 1.9%), but bans earlier in the year dampened growth expectations.

Global Market Dynamics: Renewed bird flu outbreaks in the US, Brazil's main competitor (US: 27% global share; Brazil: 38%), may boost Brazil's export demand.

Production Forecasts: Chicken meat production expected to rise up to 2.2% to 15.3 million tons in 2025 and up to 2% to 15.6 million tons in 2026.

Sources: [The Poultry Site](#)



China's Poultry Imports from Brazil Appear Tight for 2026

Import Constraints: China's suspension of Brazilian poultry over HPAI and continued US state bans leave major suppliers offline, tightening 2026 import availability.

Supply Gap: Brazil normally supplies over half of China's imports; Thailand, Russia, and smaller origins cannot fill the shortfall.

Forecast: 2025 imports hold steady vs. earlier forecasts but remain below 2024 levels. H2 2025 and 2026 outlooks are tighter unless Brazil or the US regain access.

Tariff Uncertainty: Tariff exclusions extended but remain case-by-case, creating inconsistent cost visibility for buyers.

HPAI Effect: Restrictions on Brazil and the US continue to be the main driver of China's tighter poultry import supply.

Pinch Point: 2026 paw imports likely fall due to stricter inspections and HPAI limits; domestic paws rise but remain lower quality.

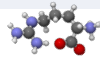
Production & Consumption: Output expected to reach 16.7 mt in 2026; consumption 16.0 mt, supported by QSR and institutional demand. White broilers now dominate (~70% of production).

Source: [Asian Agribiz](#)

Broiler & Breeder News Asia

3 - 9 Dec 2025

Feed and Nutrition



How Amino Acids Affect Appetite in Newborn Chicks

Key Insight: A review by Dr. Phuong V. Tran (Kyushu University) highlights how amino acids—particularly L-ornithine—serve as rapid satiety signals in neonatal chicks, influencing their short and frequent feeding behavior.

Mechanism: Short-term refeeding increases levels of free amino acids in the chick brain. L-ornithine strongly suppresses food intake in a dose-dependent manner and acts independently of stress pathways.

Interaction with NPY: When L-ornithine is co-administered with the appetite-stimulating neuropeptide Y (NPY), it significantly reduces NPY's feeding-stimulatory effect, suggesting a fast-acting regulatory loop controlling appetite.

Other Amino Acids: L-tryptophan and L-proline affect feeding behavior indirectly through their sedative and sleep-inducing properties, which commonly follow feeding bouts.

Implications for Industry: Findings support opportunities to refine dietary amino acid formulations to optimize early chick nutrition, enhance flock health, and improve long-term productivity. Research in chicks may also offer insights applicable to mammals.

Source: [Poultry World](#)



SBM Supply Remains a Challenge for Myanmar

Key Issue: Myanmar continues to face shortages of high-quality protein sources, especially soybean meal (SBM), due to import restrictions, licensing hurdles, and fluctuating exchange rates.

Import Trends: SBM imports peaked at 1.1 Mt in 2020 but declined sharply after 2021 because of Covid-19, political instability, and policy shifts.

Quota Limitations: For 2024/25, the SBM import quota is set at 300,000 tons, dropping to 200,000 tons in 2025/26—well below the estimated national requirement of 500,000 tons.

Domestic Supply Gap: Local oilcake production (≈100,000 tons) is insufficient for feedmill needs. Efforts to expand oilseed cultivation will take time to bridge the gap.

Licensing Constraints: In H1 2024/25, importers applied for 106,397 tons (75% of the quota), but only 37% was approved. Some licenses have since been suspended or granted selectively.

Source: [Asian Agribiz](#)

Sustainability and Welfare



Automated Gender Sorting Could Boost Broiler Sustainability

Technology: High-speed imaging systems sort up to 50,000 chicks/hour with greater accuracy than manual feather sexing.

Uniformity & Processing: Gender sorting reduces flock CV by up to 4%, increases evisceration line speed up to 6%, and improves breast fillet yield consistency by 0.5–0.8%.

Market Fit: More uniform birds help processors meet strict export and retail specifications.

Precision Feeding: Females need ~2% less protein than males. Sorting enables gender-specific diets, reducing over-/underfeeding, improving growth, lowering abdominal fat, and decreasing mortality.

Resource Efficiency: Better feeding strategies reduce feed waste and improve performance monitoring.

Lower Footprint: With feed representing 68% of broiler carbon emissions, reduced mortality and condemnations help cut feed waste, water use, and energy consumption.

Source: [WATT Poultry](#)



Japfa's AI and Quantum Computing Center of Excellence Aimed at More Efficient and Sustainable Food Production

Initiative: Japfa launched an AI & Quantum Computing CoE in Singapore, partnering with SIT, NYP, and AngelQ to improve efficiency across its feed–farm–food operations.

Technology Focus: Projects include AI-driven quality inspection, sensor and AI prototyping, and quantum-computing optimization of livestock operations.

Operational Benefits: Early pilots in Vietnam (swine) and Indonesia (poultry) show potential for real-time monitoring, productivity gains, improved animal health, and reduced waste.

Strategic Impact: Supported by EnterpriseSG and EDB, the CoE strengthens regional food security and positions Japfa as a leader in digital innovation for sustainable protein production.

Source: [aviNews](#)