

Broiler & Breeder News Asia

31 Dec 2025 - 6 Jan 2026

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Market Trends and Exports/Imports



ASEAN 5 Poultry Industry to Experience Fast Growth

Regional Outlook: Poultry production across the ASEAN 5 is projected to grow 3.8% year-on-year, reaching 12.7 million tonnes, according to Rabobank.

Growth Leaders: Indonesia, the Philippines, and Vietnam are the fastest-growing markets, each recording 4–5% growth, supported by balanced supply-demand dynamics and lower feed costs.

Market Drivers: In the Philippines and Vietnam, high poultry prices and profitability are reinforced by African swine fever (ASF) pressures on the pork sector, shifting protein demand toward poultry.

Indonesia Dynamics: Government-backed meal programs have supported production growth, but oversupply has pressured prices. Planned reductions in parent stock and hatching eggs are expected to help rebalance the market.

2026 Forecast: Rabobank expects 3–4% growth in 2026, led again by the Philippines and Vietnam (4–5%).

Indonesia's growth is forecast to slow to 3%, while Malaysia is expected to grow 2–3%.

Source: [Asian Agribiz](#)



Thailand and Vietnam Poultry Outlook for 2026

Regional Snapshot: Thailand and Vietnam enter 2026 with contrasting poultry strategies, showing how export access, biosecurity, and production discipline shape market performance.

Thailand – Export-Driven Growth:

- Weekly broiler production is expected to rise from 30 million to 35 million birds, with ~70% of output exported.
- Growth opportunities lie in the Middle East, Russia, and Malaysia, while China remains a key uncertainty due to ongoing export suspensions.
- Total chicken exports are still forecast to grow 3–4% to 1.27 million tonnes, with upside if China reopens markets.
- Labor shortages have eased via regional recruitment and automation; feed quality and ingredient safety remain priorities amid higher corn and soybean imports.

Vietnam – Dual-Track Poultry Growth:

- White broilers continue steady expansion, with 2025 output projected 10% higher year-on-year, largely demand-driven.
- Colored broilers, accounting for ~65% of domestic consumption, are growing faster, supported by strong consumer preference and a 29% rise in parent stock imports.
- Increasing frozen chicken imports (+8%) are beginning to pressure margins despite overall sector growth.

Source: [Asian Agribiz](#)

Feed and Nutrition



Nanotechnology as an Antibiotic Alternative in Poultry

Purpose: Nanoparticles show strong potential to reduce reliance on antibiotics in poultry production, helping address antimicrobial resistance while supporting feed efficiency and bird health.

Benefits: Research shows antimicrobial activity against pathogens such as *E. coli* and *Salmonella*, along with improved gut health, nutrient absorption, growth performance and antioxidant status.

Key Types:

- Metal nanoparticles (e.g., zinc, silver, iron) can enhance intestinal health, but require careful evaluation for potential toxicity.
- Nanozymes act as enzyme-like catalysts with antibacterial effects.
- Nanophytobiotics (e.g., ginger, thyme) improve bioavailability and performance.

Delivery Innovations: Nanoencapsulation and other nanosystems increase stability and absorption of sensitive additives such as essential oils. In-ovo delivery may further enhance early development and post-hatch performance.

Outlook: Nanotechnology offers strong promise for sustainable poultry production, provided that safety testing, green synthesis, and clear regulations guide its adoption.

Source: [Poultry World](#)

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Feed and Nutrition (Cont.)



Philippines Seen Importing More Wheat for Animal Feed

Import Growth: The Philippines' wheat imports in marketing year (MY) 2025/26 are projected to rise 16.5% to 7.4 million metric tonnes, driven by stronger demand from animal feed and food processors, according to USDA-FAS Manila.

Feed Wheat Demand: Feed wheat accounted for 52% of total imports (July–October 2025), reflecting its increased use by feed millers as a partial substitute for corn.

Price-Driven Substitution: Lower feed wheat prices earlier in 2025, alongside high corn import prices, encouraged greater inclusion of wheat in feed formulations.

Market Dynamics: While feed wheat use is expected to increase due to a gradual recovery in the swine sector, rising corn price competitiveness may temper further substitution.

Key Driver: Relative pricing between feed wheat and corn remains the main factor influencing feed wheat inclusion in animal diets.

Source: [Business Mirror](#)

Avian Influenza and Disease Outbreaks



Avian Flu Re-emerges in India's Kerala State; Wider Spread Across Asia

India (Kerala): After a six-month gap, H5N1 highly pathogenic avian influenza (HPAI) was confirmed at 11 poultry farms during the week starting December 9, affecting around 84,400 birds through mortality and culling. The outbreaks were clustered in Kottayam and Alappuzha districts.

South Korea: A sharp escalation saw total poultry outbreaks rise to 32 cases as of January 5, impacting over 584,000 birds since mid-September. Affected species include ducks, laying hens, broiler breeders, and quails.

Japan: Poultry outbreaks increased from 6 to 13 in the past month, including broiler breeders and large layer flocks (up to 970,000 birds). H5N1 has been confirmed in most cases, with infections widely dispersed across several regions and detections also reported in wild birds.

Taiwan: 2 new H5N1 outbreaks in mid-December brought the total since July to 7, affecting over 391,000 birds. Authorities have raised risk levels due to cold weather and migratory birds, urging stricter biosecurity and wild bird exclusion.

Philippines: 4 ongoing H5N1 outbreaks are reported, involving point-of-lay chickens, ducks, and broiler breeders in Quezon City and Nueva Ecija.

China (Human Health): 3 additional human cases of avian-origin influenza A(H9N2) were confirmed in November, bringing the six-month total to 18 cases across 10 regions, with no fatalities reported.

Source: [WATT Poultry](#)

Additional Highlight



Structural Shift Imminent for Asia's Poultry Sector

Climate Risk: Extreme weather is increasingly disrupting production, highlighted by Sri Lanka's Cyclone Ditwa, which reportedly wiped out nearly 10% of the national broiler flock, reinforcing the need for infrastructure resilience and disaster preparedness.

Food Safety & Consumer Trust: Concerns over nitrofurans residues in eggs in India showed how quickly consumer confidence can be shaken, underscoring the growing importance of transparency, traceability, and credible communication.

Logistics & Market Stability: Despite chicken self-sufficiency, Indonesia continues to face regional shortages and price distortions due to distribution and cold-chain gaps, emphasizing logistics as a critical growth factor.

Industry Investment: Expansion by Indonesian integrators into breeding and layer operations signals a shift toward integrated, quality-focused production rather than volume-led growth.

Trade & Biosecurity: Kuwait's reopening of poultry imports from Bangladesh highlights how biosecurity, disease surveillance, and regulatory trust are now key determinants of market access.

2026 Outlook: While pressures from climate, logistics, and regulation persist, these challenges are accelerating professionalisation, investment, and technical upgrading across Asia's poultry sector.

Source: [Asian Agribiz](#)