

## Asian poultry markets diverge as trade disruptions and price pressures persist

Asia's poultry markets are facing mixed conditions as global trade disruptions, disease outbreaks, and shifting consumption patterns reshape the region, according to the RaboResearch Global Poultry Quarterly Q3 2025 report, led by Nan-Dirk Mulder, Senior Global Specialist Animal Protein at Rabobank.

China's poultry market remains under pressure, with prices weak despite steady production growth. Live bird prices in April and May averaged 5% lower year-on-year, fluctuating between USD 0.97 and 1.40/kg, as market sales slowed and production rose 5% in Q1 2025. Day-old chick prices declined, while production costs fell 5% to 10% due to lower feed grain prices.

Imports rose 7% in the first four months of the year, but future volumes face uncertainty following China's suspension of Brazilian poultry imports after a May bird flu outbreak. Brazil accounted for 61% of China's poultry imports during the period. US exports to China fell 58% amid trade tensions, with no immediate alternative for Brazil's export volume. However, China's poultry exports surged 42% year-on-year, driven by strong global demand.

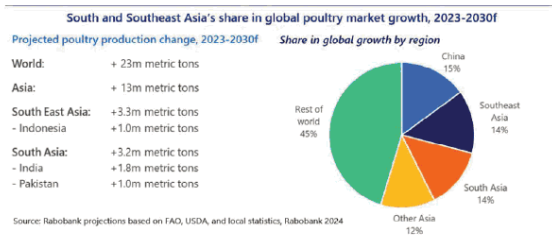
### Shifting consumer preferences in Japan

Japan's poultry sector continues to benefit from shifting consumer preferences as food inflation pushes demand toward chicken. At-home chicken consumption in Q1 2025 rose 0.6% year-on-year, while beef and pork consumption declined 6.1% and 3.3% respectively. The foodservice sector has also shown stable demand.

Domestic production has been constrained by health challenges and cold weather, with chicken inventory down 30% year-on-year by March. Although raw chicken imports declined 13% in Q1 2025, RaboResearch expects Japan to increase imports in Q3, particularly from Brazil. "Japan may seize the opportunity to import more Brazilian chicken at lower prices," the report noted.

In contrast, Thailand's poultry sector is outperforming, supported by record exports and robust global demand. Poultry exports reached 323,000 metric tons in Q1 2025, with processed chicken shipments up 7% and raw and salted exports rising 2%. Domestic prices remain firm as pork and beef costs soar, while lower feed costs have eased production expenses.

RaboResearch expects Thailand's exports to continue growing, especially as global buyers seek alternatives amid Brazil's supply disruptions.



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European pork owes its integrity to its origin. Produced in the EU, it is subject to some of the world's most rigorous standards. Farmers follow strict protocols that promote animal welfare, regulate feed, and maintain full traceability. Every step of the production process, from farm to fork, is subject to strict oversight, offering assurance not only of food safety but also of ethical and transparent farming practices.

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Running from 2025 to 2027, the "European Pork. Pork in Style" campaign brings the story of European pork from France and Portugal to life for a global audience. Activities include masterclasses, trade fairs, tasting events, retail promotions and visits to European producers. These initiatives bring together key players from across the food sector, providing a closer look at the standards, expertise, and innovation behind European pork.

European pork represents more than a premium cut. It embodies trusted quality, responsible production rooted in sustainability and animal welfare, refined flavour, and the culinary versatility sought after by chefs, retailers, and modern consumers.

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