

INDUSTRY NEWS

A High Level Review of 2025

Thai layer farms must follow GAP standard

According to the National Bureau of Agricultural Commodity and Food Standards, Thai layer farms must comply with Good Agricultural Practices standards starting from February 21. This rule will be applied to those with a flock size of 10,000-99,999 hens and who have obtained a license as a producer, exporter, or importer from the bureau.

The bureau believes that adhering to these standards will boost consumer confidence in the safety of eggs and egg products. This aims to minimize the environmental impact and safeguard layer health, which is crucial in preventing significant disease outbreaks that could harm farmers and the overall layer industry in Thailand.

According to the Department of Livestock Development, Thailand has 127,000 layer farmers with 70.56 million layers (day-old chicks to laying hens) in 2024. (Source: National Bureau of Agricultural Commodity and Food Standards, 15th January 2025)

Challenges for Thailand's livestock industry amid US high tariff



The recent reciprocal tariffs imposed by the US have significantly impacted global trade, affecting various sectors, including Thailand's livestock and processed food industries. With the announcement of a 36% tariff on Thai products, the government has indicated its intent to negotiate with the US to mitigate the effects.

Industry experts noted that the US is keen to promote its agricultural products in Thailand, particularly beef, pork, soybeans, and feed corn.

However, Pornsil Patchrintanakul, Secretary General of the Federation of Livestock and Aquaculture, has voiced concerns about opening the Thai market to US meats. He emphasized the importance of adhering to local health regulations, particularly regarding the prohibition of lean meat promoters, which means that all imports must comply with Thai laws.

This perspective is shared by Sitthiphan Thankiatphinyo, President of the Swine Raisers Association of Thailand (SRA), who strongly opposed the importation of US offal.





Thailand bans animal-feed corn from burned fields in major shift

Thailand's Department of Internal Trade (DIT) intends to help farmers distribute 3.5 million eggs through its provincial commerce office network nationwide this month. The distribution initiative run from November 17 to 23 and is designed to reduce market supply pressures amid declining egg prices.

The current supply of eggs has reached high levels due to ongoing production and favorable weather conditions that have supported output since October. However, demand has weakened, attributed to reduced consumer purchasing power, the school break, and the Vegetarian Festival.

The DIT forecasts that egg prices will either stabilize or see a slight increase. Since mid-October, the recommended farm-gate prices for eggs in Thailand have been adjusted downward 3 times, with the current price at USD 2.77 for 30 eggs. (Source: The Nation, 30th November 2025)

"Meat products like pork should not be allowed in, as they don't meet Thailand's regulations and could severely threaten local pig farmers, given that US production costs are significantly lower". According to the SRA president, the production cost for live pigs in Thailand exceeds USD2/kg; in the US, it is around USD 1.17/kg.

Meanwhile, Poj Aramwattananont, Chairman of the Thai Chamber of Commerce (TCC), suggested that Thailand could consider increasing imports from the US in areas that would not adversely affect local farmers, particularly in agricultural products and food.

He pointed out the opportunity to import seafood, such as frozen salmon, scallops, and tuna, from US-flagged vessels to bolster Thailand's food processing sector. Additionally, he mentioned that importing animal offal for pet food production could help create high-quality export products.

Mr Pornsil pointed out that Thailand is facing a significant shortage of feed corn, making it vital for the country to explore market opportunities for imported corn from the US.

Currently, Thailand requires 9.2 MMT of corn annually, producing 5 MMT domestically and importing 2 MMT from neighboring countries, along with about 1.7 MMT of wheat.

In the first five months of MY 2024/25, Thailand's corn imports surged by 83% YoY and were 84% higher than the average import levels over the past five years. This rise was primarily due to a rebound in the swine and poultry sectors. Swine production is expected to reach 80 % of the capacity before the ASF outbreak in 2022.

The government's policy for importing feed corn and alternative raw materials remains unchanged. Between February 1 and August 31, 2025, importers can import duty-free feed corn under the Afta. They must also purchase 3 tonnes of domestic corn for 1 tonne of imported feed wheat. (Source: Federation of Livestock and Aquaculture & Thai Chamber of Commerce, 5th May 2025)



Thailand's DLD helps lift efficiency and quality of livestock

Thailand's Department of Livestock Development (DLD) has supported livestock cooperatives nationwide in producing and selling feed to their members. This is part of the department's 'Green Flag Feed' initiative to improve the efficiency of the livestock industry and quality of livestock products. The DLD has operated three feed production projects focusing on total mixed ration (TMR), swine feed, and feed crop.



The TMR project aims to produce TMR for beef and dairy cattle, utilizing agricultural byproducts such as palm oil meal, dried leucaena leaves, fermented cassava leaves, and pineapple peel. The department plans to produce 670 tonnes of TMR in 2027 and sell it at affordable prices to farmers.

Moreover, the DLD encourages independent farmers to produce their own pig concentrates. Experts from the department's feed management mobile unit will offer guidance on formulating these concentrates, recommending ingredients such as corn, soybean meal, premixes, sodium, and rice bran. The DLD said the appropriate formula will help farmers reduce production costs by an average of 20% while maintaining meat quality.

The department also supports the expansion of feed crop plantations by 8,000 hectares, supplying seeds and stem cuttings of crops such as Napier grass, *Stylosanthes hamata*, and corn. This project aims to provide farmers with quality feed crops, decrease dependence on external markets, and enhance local feed security. (Source: Department of Livestock Development, 24th October 2025)

Thailand moves ahead with new feed ingredient import measures



Thailand's cabinet has approved measures for feed ingredient imports for 2026-2028 to ensure a sufficient and steady supply of raw materials and maintain the country's competitiveness.

Thailand has insufficient supplies of soybean meal and fishmeal for its livestock and aquaculture industries; consequently, the country must increase its imports annually. The upcoming import measure will mirror those of this year, with adjustments made as necessary to changes in trade

agreements.

For soybean meal imports, the cabinet has authorized 11 importers, including the Thai Feed Mill Association, to import under the WTO quota with 2% import tax application. In contrast, imports



from Asean countries will be exempt from taxes, and soybean meal sourced from other countries will be subject to a 6% import tax with an additional fee of USD78/tonnes.

Authorized importers have to buy domestic soybean meal at specified minimum prices to support local soybean refining factories and Thai soybean farmers.

The import regulations for fishmeal will remain unchanged. Fishmeal with protein content below 60% requires a permit for importation, while those containing 60% or more protein can be imported without restriction on quantity.

Typically, import tax under FTAs ranges from 0–5%, while non-FTA countries face a maximum rate of 15%. (Source: The Thailand Government, 11th November 2025)

Thai pig prices improve but are still below production costs

Thailand's pig prices have risen but remain below production costs, following the implementation of several measures aimed at reducing market supply.

Sitthiphan Thankiatphinyo, President of the Swine Raisers Association of Thailand (SRA), said that the situation in the pig industry has improved since the introduction of the barbecued suckling pork initiative, which utilizes pigs weighing 4-7 kg. The association aims to use 100,000 piglets for this project this year. The association has also requested that large farms refrain from increasing their pig populations.

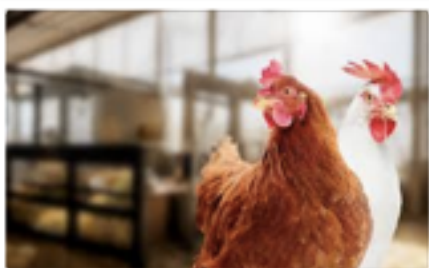


He said the demand for pork has also improved as the year-end festive season approaches, contributing to the upward trend in pig and pork prices.

According to Mr Sitthiphan, the production costs are about USD 1.92-2 /kg, while the farm-gate prices for pig range from USD 1.85 to 1.92/kg, and the wholesale prices hit USD 1.67/kg.

Currently, Thailand has over 900,000 sows and about 21-23 million fatteners, he said. (Source: Bangkok Post, 6th November 2025)

Thailand sees production growth of chicken meat



Thailand's Kasikorn Research Center has forecasted a 1.3% YoY growth in Thai chicken meat production, reaching 3.44 MMT this year. This growth is attributed to an increase in domestic chicken consumption, rising pork prices, and concerns over disease outbreaks in beef cattle, leading consumers to turn to chicken as an alternative source of meat.



The farm-gate price for chicken is expected to rise by 3.5% YoY, reaching USD1.28/kg. While feed raw materials prices show a downward trend, other costs, including standard farm management and utilities, are rising.

Due to chicken being on the controlled price list, retail prices will only see limited increases. Therefore, chicken entrepreneurs should manage costs effectively to maintain their income and profit margins. (Source: Asian Agribiz, 4th July 2025)

Thailand's feed demand to grow slightly this year



Thailand's feed demand is expected to rise between 1% and 3% this year, influenced by the availability of raw materials, according to the Thai Feed Mill Association.

Sompob Auesongtham, the Thai Feed Mill Association's secretary general, said that with sufficient raw materials for production, a rise of 3.48% year over year is projected, reaching 21.84 million tonnes.

If raw material supplies are constrained, growth may be limited to just 1.1%. Last year, the feed demand stood at 21.1 billion tonnes.

He said the industry remains robust this year, largely due to a drop in raw material prices, which have fallen about 7-10% YoY due to a global economic slowdown and an abundant supply.

(Source: Thai Feed Mill Association, 5th August 2025)

Thailand's new hen replacement scheme targets egg market stability

Thailand's Laying Hen Industry Development Fund has announced compensation guidelines for laying hen replacement.

Farmers will receive USD 0.31/hen for replacement made at 75 weeks of age or earlier. Eligible farmers must not have any other flocks of laying hens older than 80 weeks on the same farm. The rule does not apply to non-contracted farms with fewer than 30,000 hens.



Compensation is available for those who replace their hens between September 1 and December 31, 2025. They must submit the applications and required documents between October 31, 2025, and January 15, 2026.



Manot Chuthapthim, President of Thailand's Layer Farmers Association, said this is an opportunity for farmers to replace their laying hens, which could help reduce supply in the market and stabilize egg prices. (Source: Thailand's Layer Farmers Association, 28th October 2025)

Thailand aims for more shrimp exports to US



A 50% reciprocal tariff imposed by the US on Indian imports is set to have significant repercussions for India while potentially boosting Thai shrimp exports.

According to Thailand's Department of Fisheries, India is currently the largest shrimp supplier to the US, making up 36.14% of the US's total shrimp imports. With the addition of anti-dumping and

countervailing duties, Indian exporters face a duty of 59.73%. The department forecasted that Indian shrimp exports to the US could decrease by 80%, or about 240,000 tonnes, this year.

Thailand is projected to increase its shrimp exports to the US by an additional 25,000 tonnes this year. (Source: Thailand's Department of Fisheries, 11th September 2025)

Thailand's dairy farmers expected to be affected by zero tariff on dairy products from Australia and NZ

The zero tariff on dairy products from Australia and New Zealand will take full effect on Wednesday after a 20-year-long transitional period, with the Cooperative Promotion Department (CPD) warning local dairy farmers and cooperatives to prepare for the potential impact.



CPD director-general Visit Srisuwan said the removal of tariffs could affect local dairy farmers, and urged them and their cooperatives to enhance milk quality and reduce production costs. He explained that such improvements were necessary for farmers to remain competitive against the expected surge of imported milk products from both countries, following the full implementation of the free trade agreement (FTA) contracts. (Source: The Nation Thailand, 31th December 2025)