# AAC MARKET PULSE

June, 2026

Philippines Feed, Livestock & Agribusiness Intelligence

## DA Intensifies Pig Repopulation Efforts, Targets Six Million More Pigs by 2028

The Department of Agriculture (DA) announced intensified efforts to rebuild the country's pig population while maintaining stable pork supplies and prices, underscoring the delicate balancing act between industry recovery and food security amid the lingering threat of ASF. Agriculture Secretary Francisco Tiu Laurel Jr. emphasized that the goal is to help pig raisers recover from ASF impacts while ensuring Filipino families have access to safe, sufficient, and reasonably priced pork.

### This Month at a Glance

- DA intensifies hog repopulation with six-million-head target by 2028
- Vietnam's ASF vaccine awaits Q3 commercial approval
- DA launches PHP140.9 million animal vaccine development program
- NDA pushes PHP140.5 million digitalization initiative
- Pork belly and chicken prices both decline 2.4% month-on-month

The DA aims to add six million pigs to the national herd by 2028, restoring domestic production capacity while reducing vulnerability to future disease outbreaks.

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## Key Numbers

- National swine inventory (2025): 8.75 million head, down from 9.57 million in 2024
- Smallholder farms accounted for 6.09 million head; semi-commercial and commercial farms made up the remainder
- Pigs slaughtered in 2025: 20.74 million head, down from 21.61 million in 2024 and 25.36 million in 2020
- Pre-ASF population (2019): approximately 13 million head
- Target: add six million pigs by 2028
- Hog production in 2025: 1.66 million metric tonnes, down from 1.7 million in 2024

## AAC View

The DA's repopulation target highlights the scale of ASF's devastation—the industry has lost roughly 4.25 million head (or 33%) from its pre-ASF level of 13 million. The government's dual mandate of rebuilding herds while keeping pork prices stable presents an inherent tension: repopulation requires higher farm-gate prices to incentivize investment, yet stable consumer prices necessitate supply expansion or imports. The DA's approach reflects a pragmatic recognition that the sector's recovery will be gradual and must be balanced against food inflation concerns.

## Business Implications

- Demand for high-health genetics will increase.
- Replacement gilts and breeding animals may become strategic bottlenecks.
- Suppliers offering biosecurity, vaccination, diagnostics, and productivity solutions will benefit.
- Modern commercial farms are likely to gain market share.

*Source: Malaya Business Insight, 15th, June 2026*

# ASF vaccine from Vietnam expected in Q3

The Philippines may receive commercial release certification for the AVAC African swine fever live vaccine from Vietnam as early as the third quarter of 2026, according to DA spokesman Arnel de Mesa.


Once certified, the vaccine will be made available through outlets, biologics stores, and veterinary shops registered with the Bureau of Animal Industry. ASF has affected the Philippine swine industry since 2019, causing billions of pesos in losses. As of early June, eight barangays still recorded active ASF cases. Chester Warren Tan, President of the National Federation of Hog Farmers Inc., expressed optimism that production growth this year could double the pace seen in 2025.

## Key Numbers

- ASF presence in Philippines: since 2019
- Active ASF cases as of early June: eight barangays
- Hog production (2025): 1.66 million metric tonnes (slightly down from 1.7 million in 2024)
- AVAC vaccine efficacy: previously reported at 90%

## AAC View

The impending commercial approval of Vietnam's AVAC vaccine represents a potential turning point for the Philippine swine industry. Seven years of ASF losses have decimated the national herd, and a safe, effective vaccine is the single most important tool for enabling farmers to repopulate with confidence. However, the controlled rollout phase means commercial-scale vaccination will take time to reach all producers. The vaccine's success will depend on distribution logistics, farmer acceptance, and continued biosecurity measures.

## Business Implications

- Increased investment in pig repopulation is likely.
- Demand for breeding stock, farm technology, and health products may accelerate.
- Vaccine availability could encourage producers to rebuild herds faster.

*Source: The Manila Times, 25th, June 2026*

# DA Launches PHP140.9 Million Animal Vaccine Development Program

The DA launched the PHP140.9 million Animal Vaccine Development Program in partnership with the DA-National Livestock Program, the Bureau of Animal Industry (BAI), the Philippine Carabao Center, and Central Luzon State University. Agriculture Secretary Tiu Laurel said the program seeks to ensure food security and improve the country's long-term disease defences.

Local vaccine development will strengthen the swine and poultry industries amid ongoing recovery from ASF and avian influenza outbreaks. The DA secured PHP77.6 million for the AVDP in 2026, PHP30.6 million for 2027, and PHP32.7 million for 2028.

## Key Numbers

- Total AVDP budget: PHP140.9 million
- 2026 allocation: PHP77.6 million
- 2027 allocation: PHP30.6 million
- 2028 allocation: PHP32.7 million
- Focus diseases: ASF and foot-and-mouth disease (FMD)

## AAC View

The AVDP represents a strategic long-term investment in the Philippines' livestock biosecurity. By developing vaccines tailored to local pathogen strains, the program aims to offer advantages over imported products in terms of effectiveness against local variants. The establishment of a Biosafety Level 3 facility will enhance the country's capacity for advanced research and disease preparedness. While the Philippines remains FMD-free, outbreaks in neighbouring countries underscore the importance of preparedness. The program's three-year funding profile suggests a sustained commitment to vaccine self-sufficiency.

## Business Implications

- Long-term animal health ecosystem development will accelerate.
- Local research partnerships may create opportunities for international technology providers.
- Biosecurity and disease management will remain strategic investment areas.

*Source: Philippine News Agency, 15th, June 2026*

# NDA Pushes PHP140.5 Million Digitalization of Operations and Regulatory Services

The National Dairy Authority (NDA) will propose a PHP140.5 million fund in the 2027 budget for digital infrastructure to modernize its operations and regulatory services nationwide. NDA Administrator Marcus Antonius Andaya said the program addresses stakeholders' calls for faster, more transparent, and more convenient regulatory transactions. Dairy processors and business operators want reduced paperwork, minimal processing delays, and real-time updates for applications and compliance requirements.


## Key Numbers

- Proposed digitalization budget: PHP140.5 million
- Target year: 2027
- Platforms to be developed: Online License to Operate (LTO) Portal, Online Certificate of Product Registration (CPR) System, Milk Feeding Program Monitoring Application, enhanced Online LTO Information System

## AAC View

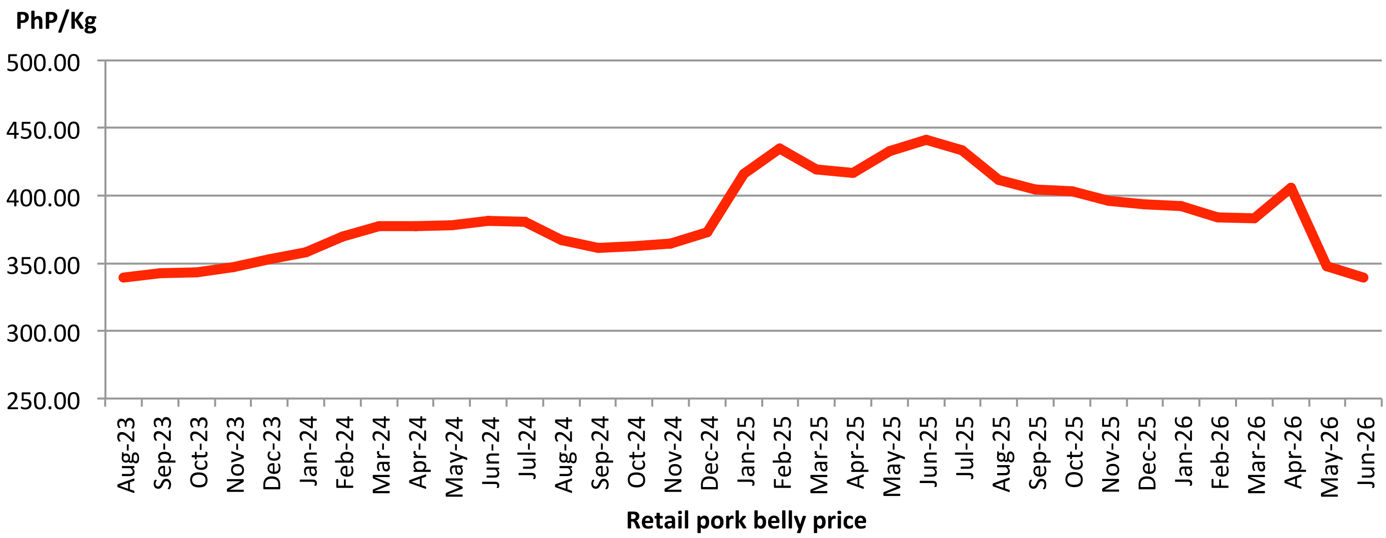
The NDA's digitalization push reflects a broader government agenda of digital transformation and ease of doing business. For the dairy industry—which has long faced regulatory bottlenecks—streamlined licensing and registration processes could significantly improve operational efficiency and compliance rates. The proposed unified network linking the NDA Central Office with regional and satellite offices is particularly important for ensuring consistent service delivery across the archipelago. The program's focus on milk feeding program monitoring also supports nutrition objectives.

## Business Implications

- Technology adoption across livestock sectors will increase.
- Companies providing digital farm management solutions may find new opportunities.
- Better data availability will support investment decisions.

Source: Philippine News Agency, 4th, June 2026

# Pork Belly Price in June




DA released monthly retail pork belly price data for June 2026, showing sequential price cooling month-on-month after elevated levels through late 2025 and early 2026, though prices remained far higher than June 2025 benchmarks. Historical price trends from August 2023 to June 2026 confirm a multi-year price surge driven by ASF supply shrinkage, with prices peaking in mid-2025 before gradual softening into mid-2026.

## Key numbers

- June 2026 average pork belly price: PHP 339.14/kg
- Month-on-month change: -2.4%
- Year-on-year change: +23.1%

## AAC View

The MoM price drop reflects temporary improved pork supply from elevated import volumes and minor seasonal slaughter increases, but the steep 23.1% YoY premium underscores the persistent national pig inventory deficit. Retail price relief for consumers will remain limited until ASF vaccine rollout drives meaningful domestic herd expansion in late Q3/Q4 2026. Without balanced import controls, cheap imported pork will continue to cap farm-gate prices and delay farmer profitability recovery.

## Business implications

- Cost-saving technologies will attract producer interest.
- Feed additives, genetics, and health products with measurable ROI will gain acceptance.
- Import policy remains an important factor affecting producer confidence.

*Source: Philippines Department of Agriculture, June 2026*

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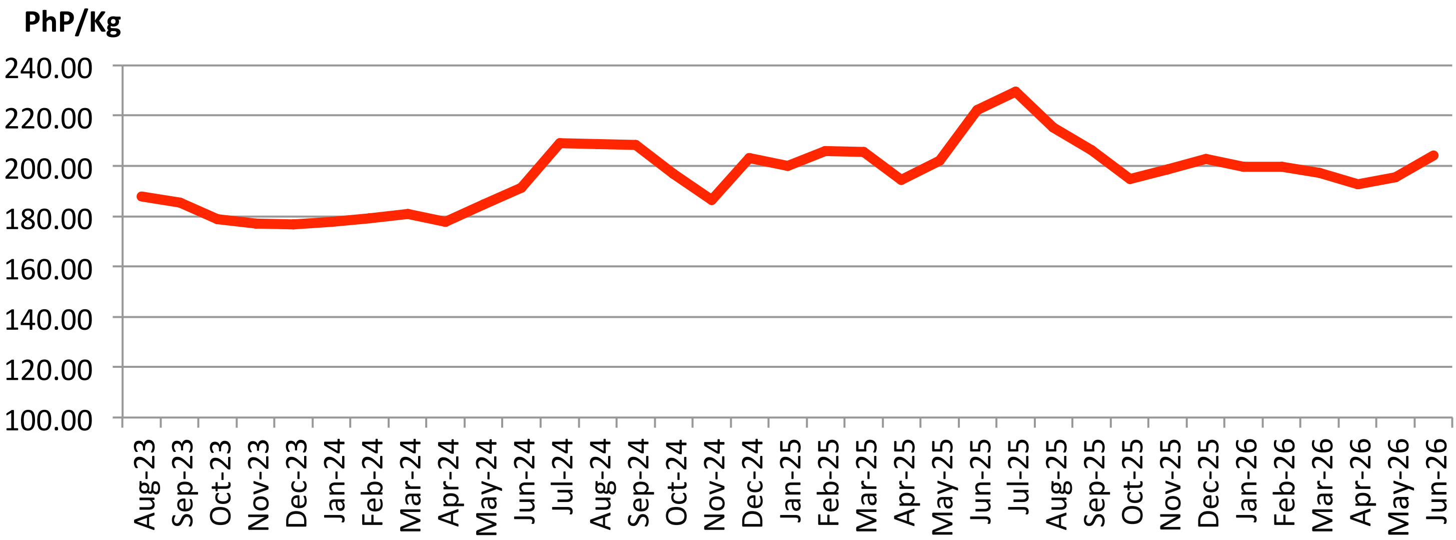
# Whole Chicken Price in June

The average price of whole chicken in June 2026 is PhP 204.01 /kg, show a decrease of 2.4% from the previous month, and 23.1% higher compared to the same period of 2025. Poultry has acted as a key affordable protein substitute amid multi-year pork price inflation, supporting steady consumer demand across foodservice and household consumption.




Retail whole chicken price

## Key numbers

- June 2026 average whole chicken price: PHP 204.01/kg
- Month-on-month change: -2.4%
- Year-on-year change: +23.1%

## AAC View

Chicken price movement tracks pork market sentiment, as consumers substitute chicken when pork becomes unaffordable. The identical -2.4% MoM cooling aligns with broader meat supply growth from higher import arrivals in Q2 2026. Unlike swine, the poultry sector faces no endemic disease crisis, creating stable baseline production capacity that prevents extreme price volatility seen in pork.

## Business implications

- For broiler farms: Stable positive demand outlook with moderate pricing power; poultry remains a defensive livestock segment amid hog industry losses.
- For meat importers: Poultry import volumes will stay elevated to match substitution demand, creating steady trade revenue streams separate from pork.

*Source: Philippines Department of Agriculture, June 2026*

# Market Outlook

Pig repopulation and vaccine rollout: The commercial approval of Vietnam's AVAC ASF vaccine in Q3 2026 will be the most significant development for the swine sector. Farmers are expected to accelerate repopulation once vaccine access is secured, though the controlled rollout means full commercial availability may take time. The DA's six-million-head target by 2028 provides a long-term growth trajectory, but near-term progress will depend on vaccine uptake and continued ASF containment.

Pork prices and farmer profitability: Farm-gate hog prices of PHP 170–185/kg remain below production costs of PHP 180–200/kg, meaning losses will continue through Q3 unless prices recover. The DA's target farm-gate price of PHP 210/kg remains distant. Retail pork prices may see further modest declines as the expanded MAV (204,210 MT for 2026) keeps import competition elevated. The farm-gate to retail price disconnect suggests that any price recovery at the producer level may lag improvements in consumer prices.

ASF risk and biosecurity: Active ASF cases in eight barangays and outbreaks in Negros Occidental underscore the ongoing disease threat. The DA's intensified biosecurity measures and the AVDP's focus on local vaccine development are positive developments, but the next 1–3 months will be critical for containing outbreaks as repopulation accelerates.

Chicken and dairy sectors: Chicken prices are expected to remain stable, with the 2.4% month-on-month decline in June suggesting adequate supply. The NDA's digitalization initiative will improve regulatory efficiency for the dairy sector over the medium term, though immediate price impacts are unlikely.

Bottom line: The next 1–3 months will be a period of transition for the Philippine livestock sector. Vaccine approval is the key catalyst that could unlock accelerated repopulation, but farmer profitability must improve to sustain momentum. The delicate balance between rebuilding herds and maintaining stable consumer prices will continue to test policymakers. Market participants should monitor Q3 vaccine approval announcements, ASF outbreak reports, and any adjustments to the MAV or farm-gate price support mechanisms.

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