INFORMATION SHEET 1 – CHICKEN MEAT PRODUCTION IN ASIA

PRODUCTION & TRADE

More than 30 billion chickens are slaughtered each year in Asia, producing more than 43 million tonnes of chicken meat (Table 1). Chicken meat production in Asia was valued at US$ 89 billion in 2020 (FAOSTAT[1]). Production is concentrated in Eastern Asia (which includes, amongst others, China, Japan and Korea), followed by Southeastern Asia (which includes, amongst others, Indonesia, Thailand, Myanmar, the Philippines, and Viet Nam). The top ten chicken meat producing companies in Asia are concentrated in the east, southeast and south of the continent (Table 2).

China[i] is the biggest producer of chicken meat in Asia, accounting for around 13% of global production[1] and 35% of Asian production in 2020 (Figure 1).

Table 1. Top 10 chicken meat producing regions in Asia. Source: FAOSTAT[1].

Region	Chicken meat production 2020 (tonnes)	Share of chicken meat production in Asia 2020 (%)	Chickens slaughtered 2020 (billions)	Share of chickens slaughtered in Asia 2020 (%)
Asia	43,491,487	100.0%	31.02	100.0%
Eastern Asia	19,165,352	44.1%	11.58	37.3%
Southeastern Asia	11,237,643	25.8%	9.71	31.3%
Southern Asia	7,956,645	18.3%	6.45	20.8%
Western Asia	4,803,314	11.0%	3.09	10.0%
Central Asia	328,533	0.8%	0.19	0.6%

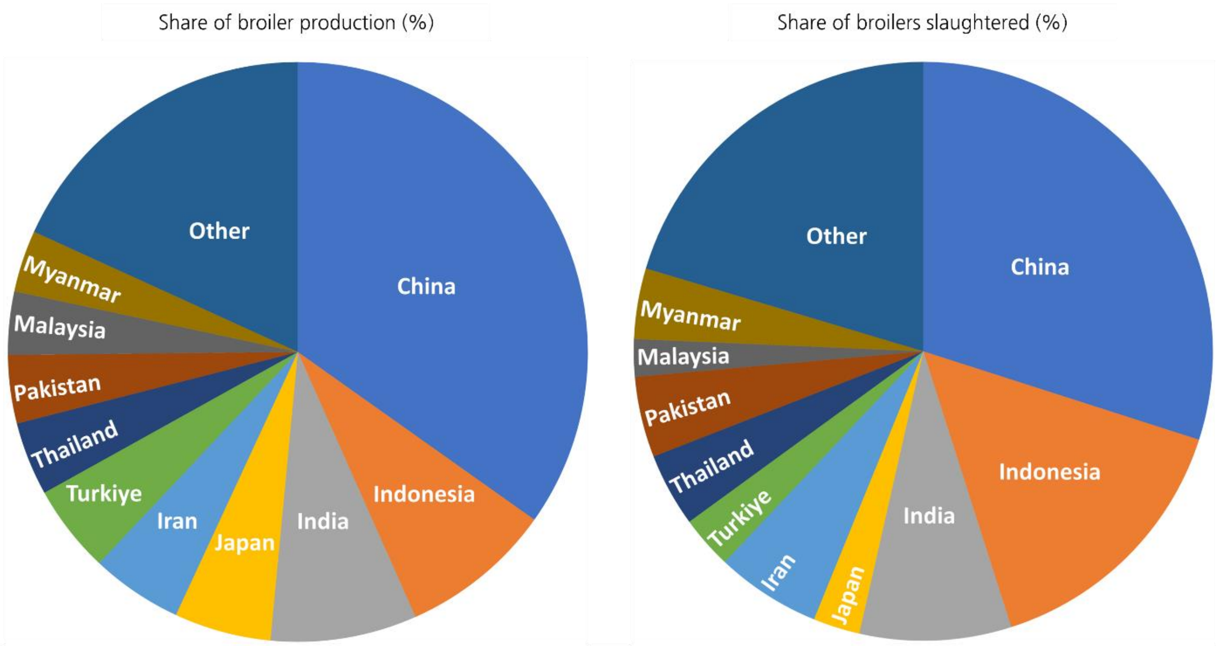

Figure 1. The main chicken producing countries in Asia by share of total Asia chicken meat production and chickens slaughtered (%) in 2020. Source: FAOSTAT[1].

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[i] Throughout this document, 'China' refers to mainland China (excluding Hong Kong, Taiwan and Macao).

Table 2. Top 10 broiler chicken producing companies in Asia. Source: Clements (2022)[2].

Company	Country	Broilers slaughtered annually (millions)
Wen's Food Group	China	1101
Wellhope Agri-Tech	China	695
CP Group	Thailand	685
Japfa Ltd.	Singapore	608
Suguna Foods	India	517
Fujian Sunner Development Co. Ltd	China	510
Doyoo Group	China	400
Harim Group	South Korea	393
New Hope Liuhe	China	375
San Miguel Foods	Philippines	350

Five of the top ten chicken producing companies in Asia are based in China, including the largest, Wen's Food Group, which slaughters 1.1 billion birds annually

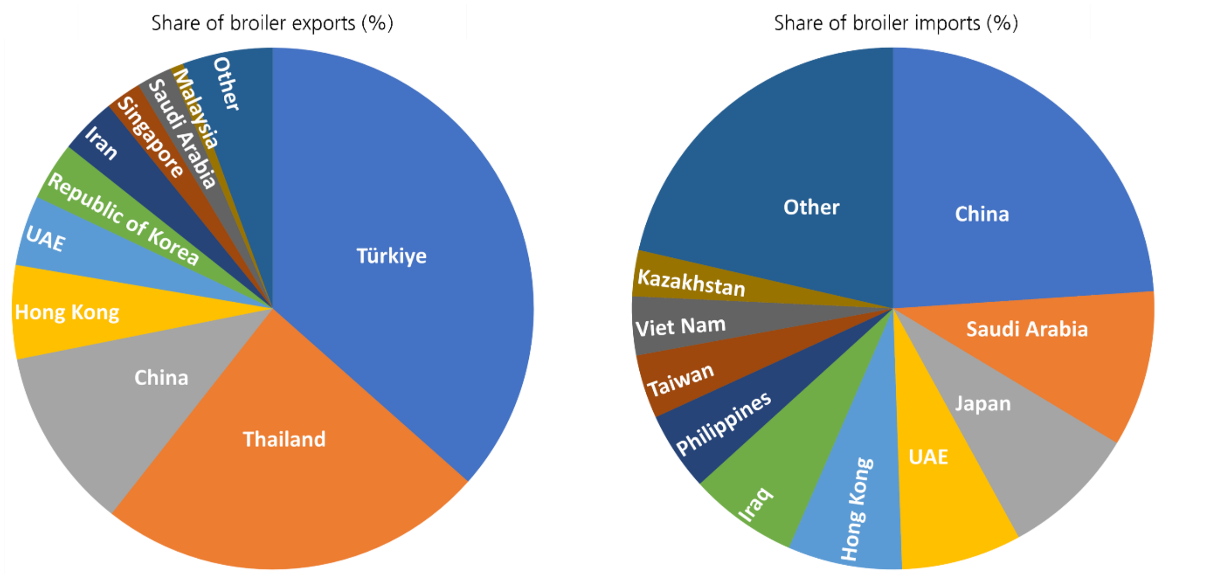

Figure 2. The main Asian exporters and importers of chicken meat by share of the market (% of tonnage) 2020. Figures are share of exports from Asian countries to any country globally and share of imports to Asian countries from any country globally. Total Asian exports = 1.4 million tonnes. Total Asian imports = 6.4 million tonnes. Source: FAOSTAT[1].

Chicken meat gross exports from Asian countries totalled 1.4 million tonnes, with a value of US$ 2.6 billion, in 2020[1]. In terms of chicken meat gross exports in 2020, the largest exporters in Asia are Türkiye and Thailand (Figure 2). Türkiye exported 522,000 tonnes, with a value of US$ 531 million, mainly to Iraq (53.8%), followed by Hong Kong (9.7%). Thailand exported 344,000 tonnes, with a value of US$ 903 million, mainly to Japan (37.4%), China (33.3%), and Malaysia (11.9%)[1].

Chicken meat gross imports to Asian countries totalled 6.4 million tonnes, with a value of US$ 10.8 billion) in 2020[1]. In terms of chicken meat gross imports in 2020, the largest importers in Asia are China, Saudi Arabia, and Japan (Figure 2). China imported 1.5 million tonnes, with a value of US$ 3.4 billion, mainly from Brazil (45.0%), USA (26.8%) and Russia (9.5%). Saudi Arabia imported 617,000 tonnes, with a value of US$ 1.1 billion, mainly from Brazil (71.8%), France (10.8%) and Ukraine (10.4%). Japan imported 535,000 tonnes, with a value of US$ 1.1 billion, mainly from Brazil (74.2%) and Thailand (23.1%)[1].

CONSUMPTION

Poultry meat consumption in Asia in 2019 was around 49 million tonnes, with China accounting for more than 40% of that (Table 3). Israel has the highest per capita poultry meat consumption in Asia at >70 kg/cap/yr[1].

Per capita consumption has increased by 18% over the past decade across Asia, to an average of 10.6 kg/cap/yr in 2019 (Table 3). There are substantial differences in per capita consumption between countries, ranging from 1.6 kg/cap/yr in Bangladesh to 71.7 kg/cap/yr in Israel[1].

Table 3. Poultry meat consumption (measured as total and per capita supply available for human consumption) in the top 10 poultry meat consuming countries in Asia. Source: FAOSTAT[1].

Country	Total domestic supply 2019 (thousand tonnes)	Per capita supply 2019 (kg/cap/yr)	Per capita supply percentage change from 2010 (%)
Asia	48,746	10.6	17.9%
China	20,001	14.2	18.4%
India	4,226	3.1	71.7%
Japan	2,552	19.3	13.4%
Iran	2,242	27.0	18.5%
Indonesia	2,176	8.0	19.3%
Myanmar	1,818	32.3	60.8%
Türkiye	1,723	20.7	11.6%
Philippines	1,437	13.3	19.1%
Saudi Arabia	1,433	41.8	-7.8%
Viet Nam	1,256	13.1	10.8%

BROILER CHICKEN PRODUCTION IN DIFFERENT SYSTEMS

In addition to the conventional floor systems with litter that are used globally, cage systems (including multi-level cage systems) and perforated/net floor systems are also commonly used for broilers in Asia. Higher-welfare commercial systems include indoor systems with lower stocking densities and enrichment, free-range systems, and organic systems.

Chicken production is Asia was once dominated by backyard and smallholder producers but over the past few decades these have been progressively replaced with specialised (mostly highly intensive and often vertically integrated) broiler production systems using imported fast-growing genetics. Backyard systems now account for a small proportion (2.2%) of chicken meat production across Asia (Figure 3) although backyard production and traditional local breeds (sometimes 'improved' through cross-breeding with imported chickens) still play a significant role in many Asian countries (see country examples below).

China: most broilers were raised in backyards prior to the mid-1980s. With the development of commercial broiler farming, the number of backyard producers has dramatically declined and now represents a small share of China's broiler farming sector, mainly meeting subsistence consumption needs[3]. The chicken meat market in China is made up of 57% white-feathered (fast-growing) broilers, 27% yellow-feathered local breed (medium-/slow-growing) broilers, 10% small '817' (fast-growing hybrid) chickens, and 6% meat of ex-layers (data for 2021[4]). The market share of yellow-feathered broilers, which are traditionally sold via wet markets, is declining[5]. Large-scale producers account for around 70% of white broiler production in China[6]. White broilers are mostly reared in cages or in perforated/net floor systems[7,8]. Yellow broilers are mostly reared in litter floor systems or perforated/net floor systems. '817' small broilers are mostly reared in cages. Less than 1% of Chinese chicken meat is produced in organic systems (11,500 tonnes in 2018 out of total chicken meat production of 14.4 million tonnes)[9].

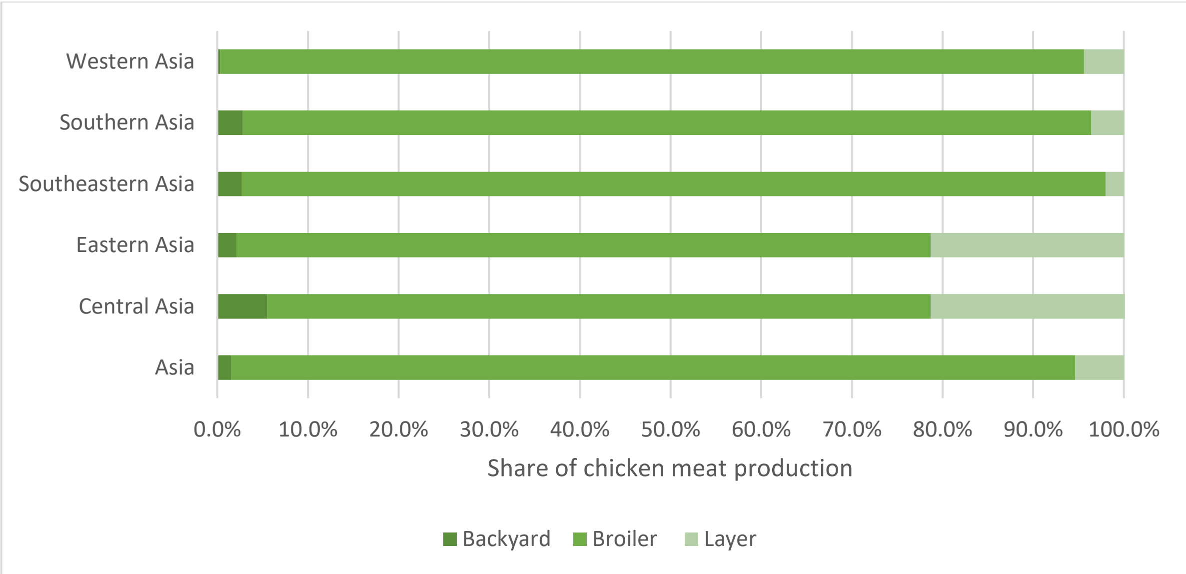

Figure 3. Share of chicken meat production from backyard systems,[ii] *specialised broiler production systems, and layer systems, in Asia. Source:* FAO GLEAM database v3.0[10].

India: In India, backyard poultry make up 37% of the country's poultry flock and backyard poultry numbers increased by 46% between 2012 and 2019[11]. The Indian Government is encouraging the scaling-up of backyard poultry keeping. Support is available for the establishment of small units for rearing 'improved' indigenous birds for meat by landless families, with birds generally reared on a free-range system, being let loose during the day for foraging and sheltered in a shed at night, with supplementary feed and water provided[12]. Most of the commercial broiler sector in India is vertically integrated and most farms use simple open sheds, with only a few large poultry integrators having controlled-environment housing with automatic feeding and drinking systems[13].

Indonesia: The poultry production sector in Indonesia is highly diverse, including backyard farms with a small number of birds for local consumption, small- to medium-scale commercial poultry farms with birds usually sold through live bird markets; medium- to large-scale commercial poultry farms with birds sold through slaughterhouses or poultry markets, and large industrial integrated poultry farms with high biosecurity and birds always marketed commercially[14]. Indonesia's poultry farming is slowly transitioning from intensive, open-housed systems to intensive closed-house, automated housing systems. This change is the result of increasing poultry market competitiveness, characterised by increasing labour costs, the quest for higher yields, and disease pressures such as highly pathogenic avian influenza (HPAI)[15].

Japan: Broiler chickens in Japan are reared at high stocking densities (50-56 kg/m^2) and reared to higher slaughter weights (3kg at 50 days) than are common in Europe and the USA[16]. The market

[ii] FAO defines backyard systems as: Production that is mainly subsistence-driven or for local markets, displaying animal performance lower than in commercial systems and mostly relying on swill and locally-sourced materials to feed animals (less than 20 percent of purchased concentrate).

for organic and free-range chicken in Japan is not well developed and organic chicken is not readily available in regular supermarkets[17,18].

Thailand: In Thailand, backyard chicken production has been largely replaced with vertically-integrated industrial production in closed housing with ventilation/evaporative cooling[19]. The share of chickens in backyard flocks of <20 birds fell from 9.2% in 1993 to 0.7% by 2013, although this still represented nearly a third (32.1%) of holdings[19].

LEGISLATION

Many countries in Asia have limited legislation applicable to farm animal welfare. The main pieces of legislation relevant to the welfare of broiler chickens for selected major chicken-producing countries in Asia are outlined below.

	There is currently no specific legislation establishing minimum welfare standards for broiler chickens in China.
	In Indonesia, while animal welfare is covered by Law no. 18 of 2009 Concerning Husbandry and Animal Health (and related Regulations), there is no legislation specifically setting the minimum standards for broiler chicken welfare during rearing.
	Poultry are covered by the general requirements of the Prevention of Cruelty to Animals Act 1960 but there is no specific legislation setting minimum welfare standards for broiler chickens in India.
	The main piece of legislation setting standards for broiler chickens in Türkiye is the Regulation on Minimum Standards for the Protection of Chickens Kept for Meat Production (2018) which aligns with EU regulations (e.g. stocking density up to 42kg/m^2 permitted, dry litter must be provided).
	In Thailand, animal welfare is covered under the Cruelty Prevention and Welfare of Animal Act, B.E. 2557 (2014) but there is no specific legislation setting minimum welfare standards for broiler chickens.
	Chickens are covered by the general provisions of the Act on Welfare and Management of Animals (Act No. 105 of October 1, 1973, as amended) but there is no specific legislation setting minimum welfare standards for broiler chickens in Japan.

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