



# **CURRENT STATUS AND WAY FORWARD OF POULTRY INDUSTRY IN MALAYSIA**

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# FOOD SECURITY CHALLENGES



Peningkatan Populasi & permintaan makanan



Peningkatan kos sara hidup dan harga makanan



Undernourishment & double malnutrition



Pemanasan global



Produktiviti rendah, berintensifkan buruh dan *aging farmers*



Tahap penerimaan teknologi dan automasi rendah



Tahap pelaburan & R&D rendah

# POULTRY INDUSTRY CHALLENGES

1

Increased  
Operational  
Cost



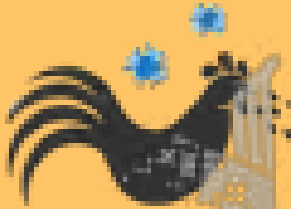
2

Working Capital



5

Disease  
Outbreak



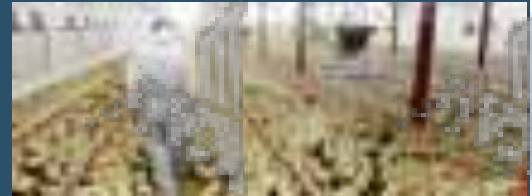
4

Planning  
Permission  
(KM)



3

Labour Shortage

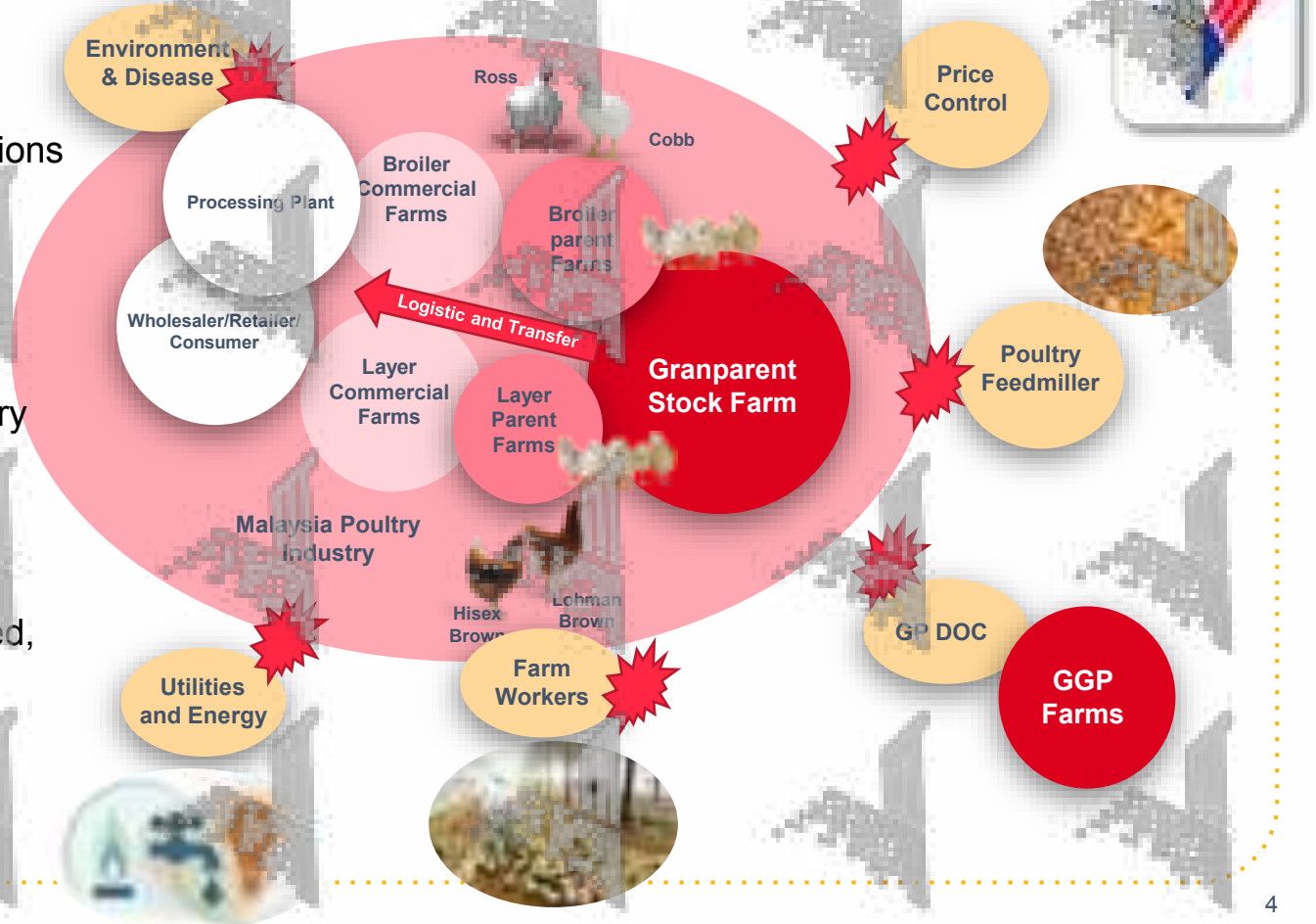


# MALAYSIA POULTRY INDUSTRY ECOSYSTEM

Poultry production operations have become larger and more specialized

The interdependencies between other external factors and poultry industry have become more significant

They are sensitive to the variation in input cost (feed, energy, drugs, etc)

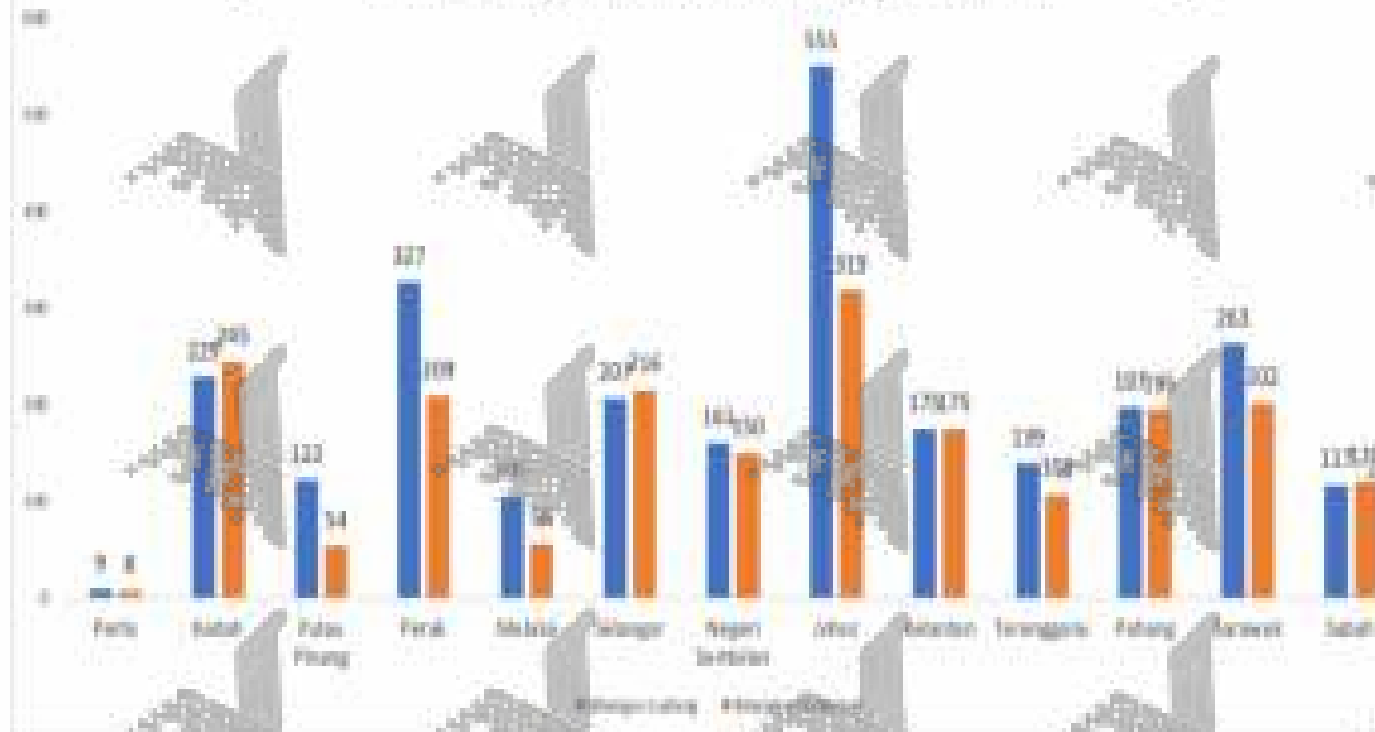




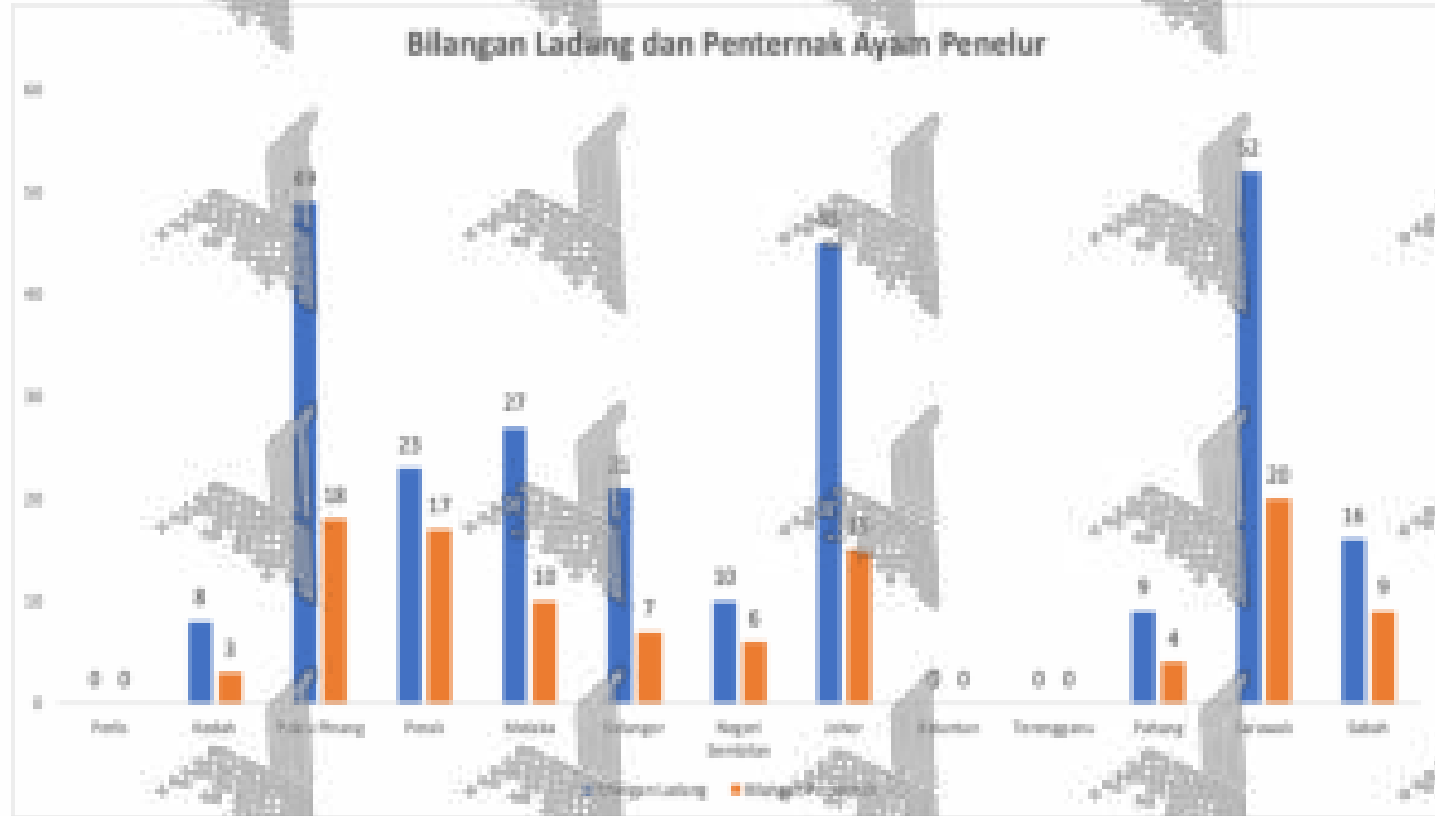
# CURRENT STATUS OF POULTRY INDUSTRY

# BROILER PRODUCERS 2022

Bilangan Ladang dan Penternak Ayam Pedaging

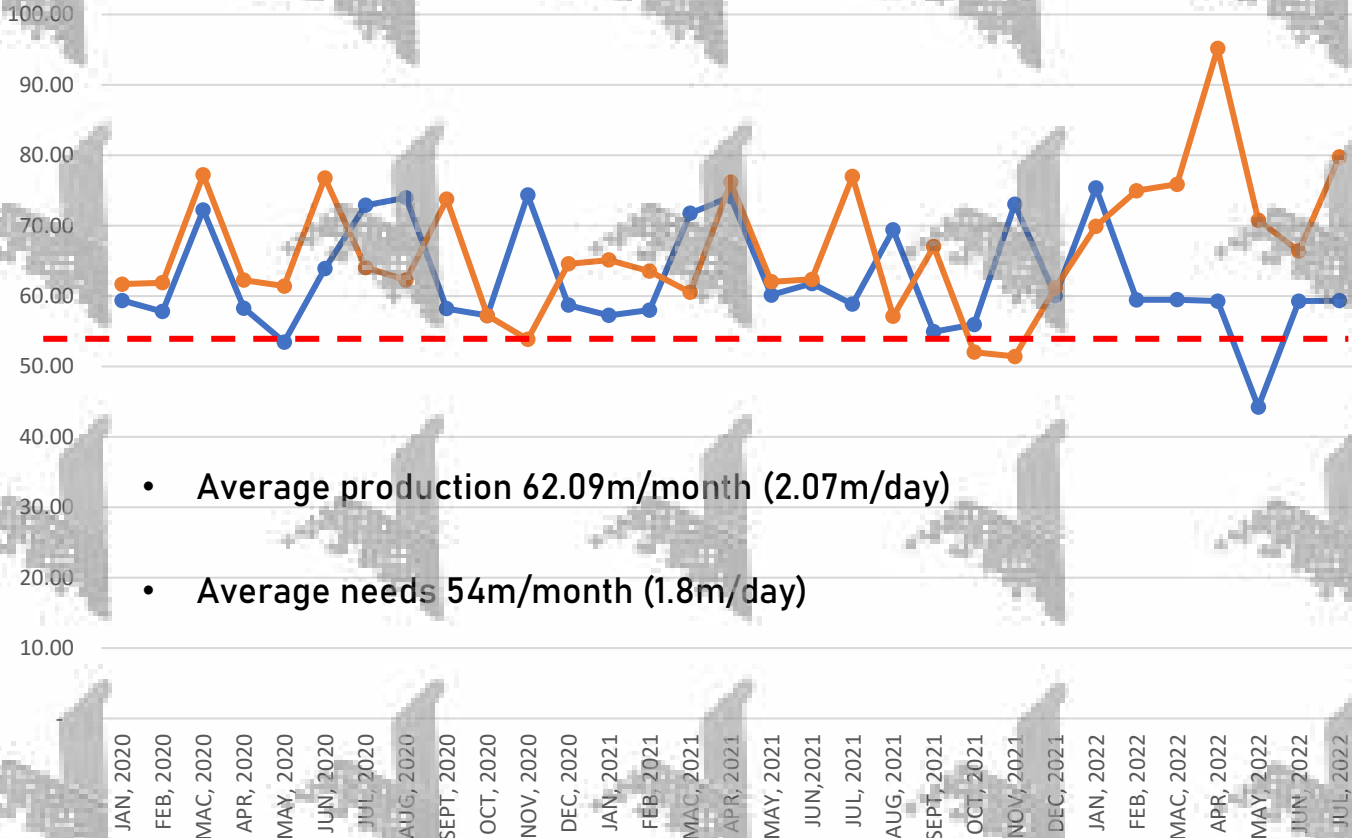


# LAYER PRODUCERS 2022



## Chicken Production 2020-2022

Millions chickens



Forecast

Forecast

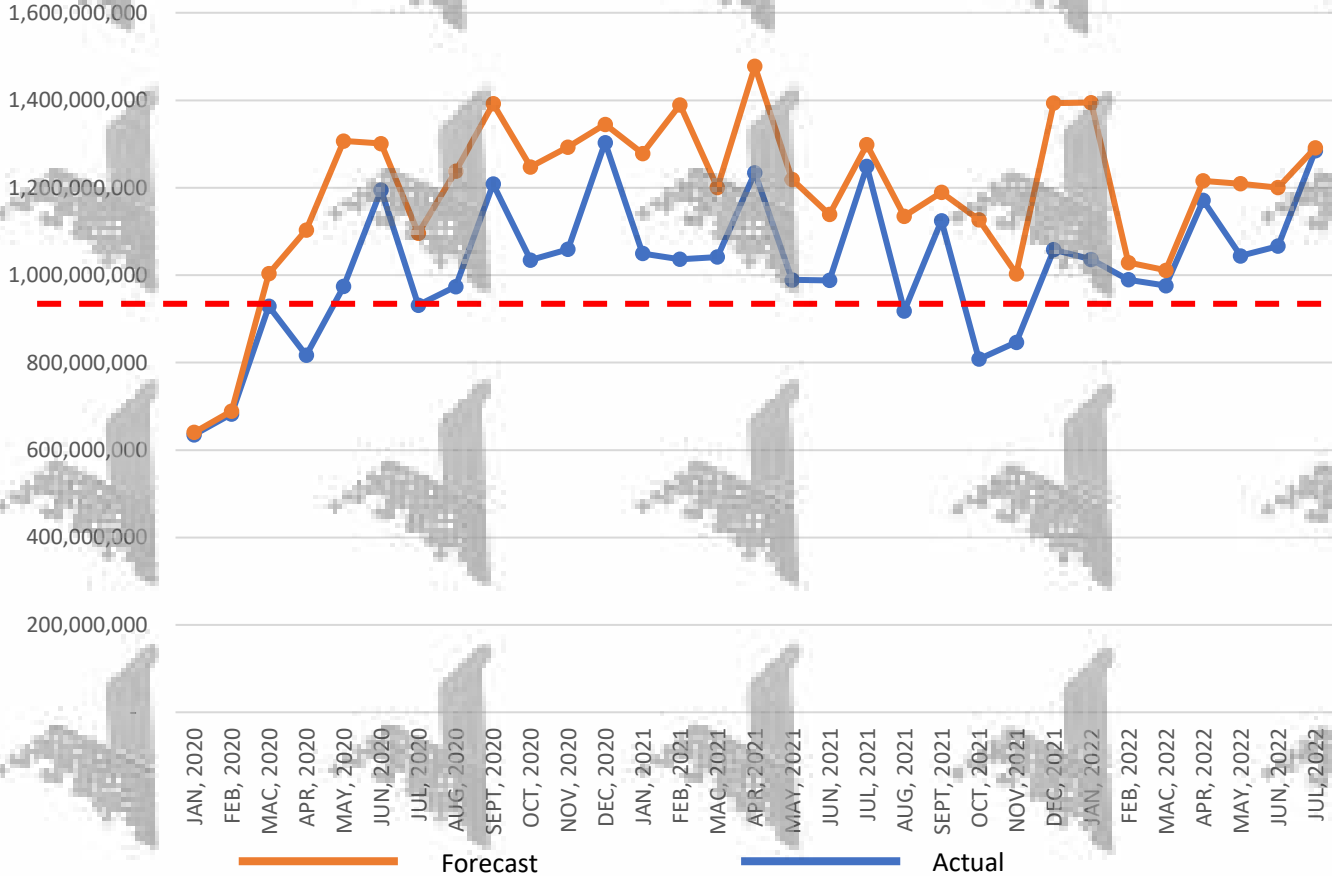
Actual

Actual

MONTH/YEAR	ACTUAL	FORECAST
JAN, 2020	59.3	61.7
FEB, 2020	57.8	61.9
MAC, 2020	72.2	77.2
APR, 2020	58.2	62.2
MAY, 2020	53.4	61.4
JUN, 2020	63.8	76.7
JUL, 2020	72.9	64.0
AUG, 2020	73.9	62.2
SEPT, 2020	58.2	73.7
OCT, 2020	57.2	57.2
NOV, 2020	74.3	53.8
DEC, 2020	58.7	64.5
JAN, 2021	57.2	65.1
FEB, 2021	58.0	63.5
MAC, 2021	71.7	60.5
APR, 2021	74.1	76.1
MAY, 2021	60.1	62.0
JUN, 2021	61.7	62.3
JUL, 2021	58.8	76.9
AUG, 2021	69.3	57.1
SEPT, 2021	54.9	67.0
OCT, 2021	55.9	52.0
NOV, 2021	73.0	51.4
DEC, 2021	60.0	61.1
JAN, 2022	75.3	69.9
FEB, 2022	59.4	74.9
MAC, 2022	59.4	75.8
APR, 2022	59.2	95.1
MAY, 2022	44.2	70.7
JUN, 2022	59.3	66.3
JUL, 2022	59.3	66.3
JUL, 2022	(21 <sup>st</sup> Jul) <sub>B</sub>	79.7



# Egg Production 2020-2022



MONTH/YEAR	ACTUAL	FORECAST
JAN, 2020	635,098,401	640,357,990
FEB, 2020	682,425,271	689,003,135
MAC, 2020	928,769,396	1,003,576,869
APR, 2020	817,006,340	1,103,527,881
MAY, 2020	974,337,164	1,306,723,159
JUN, 2020	1,194,848,889	1,300,982,561
JUL, 2020	931,561,739	1,095,647,211
AUG, 2020	974,031,153	1,237,595,014
SEPT, 2020	1,208,489,793	1,392,069,111
OCT, 2020	1,034,700,192	1,247,632,908
NOV, 2020	1,058,979,051	1,293,047,591
DEC, 2020	1,303,205,736	1,344,896,523
JAN, 2021	1,049,668,267	1,278,349,014
FEB, 2021	1,036,345,758	1,389,451,866
MAC, 2021	1,041,468,096	1,200,536,487
APR, 2021	1,234,388,328	1,477,903,351
MAY, 2021	989,101,547	1,218,936,571
JUN, 2021	988,032,499	1,138,790,134
JUL, 2021	1,248,671,108	1,298,347,563
AUG, 2021	918,078,242	1,134,908,171
SEPT, 2021	1,124,744,777	1,189,352,431
OCT, 2021	808,096,343	1,126,784,421
NOV, 2021	846,658,152	1,003,272,219
DEC, 2021	1,058,324,613	1,393,480,014
JAN, 2022	1,036,208,729	1,394,813,221
FEB, 2022	989,744,091	1,028,897,122
MAC, 2022	975,920,219	1,011,347,689
APR, 2022	1,170,953,718	1,215,637,881
MAY, 2022	1,044,113,246	1,209,115,721
JUN, 2022	1,066,529,954	1,200,574,321
JUL, 2022	1,284,586,765	1,291,342,867

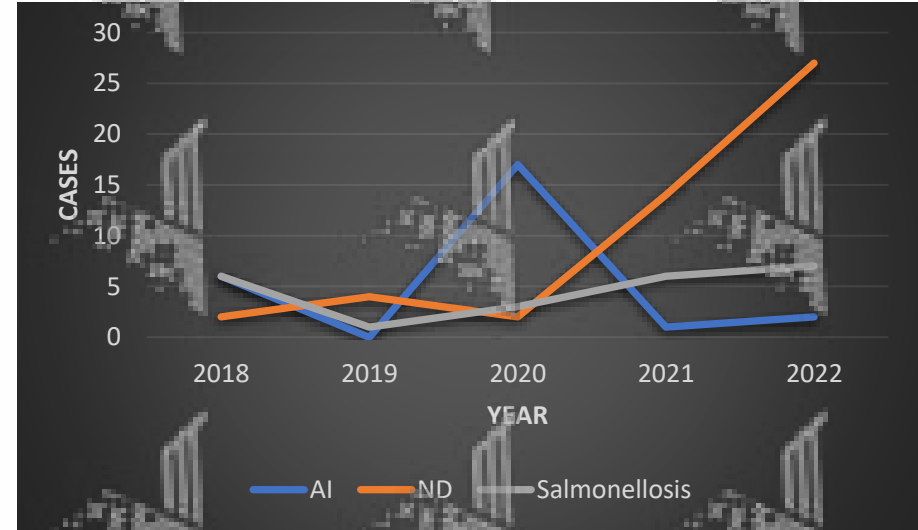
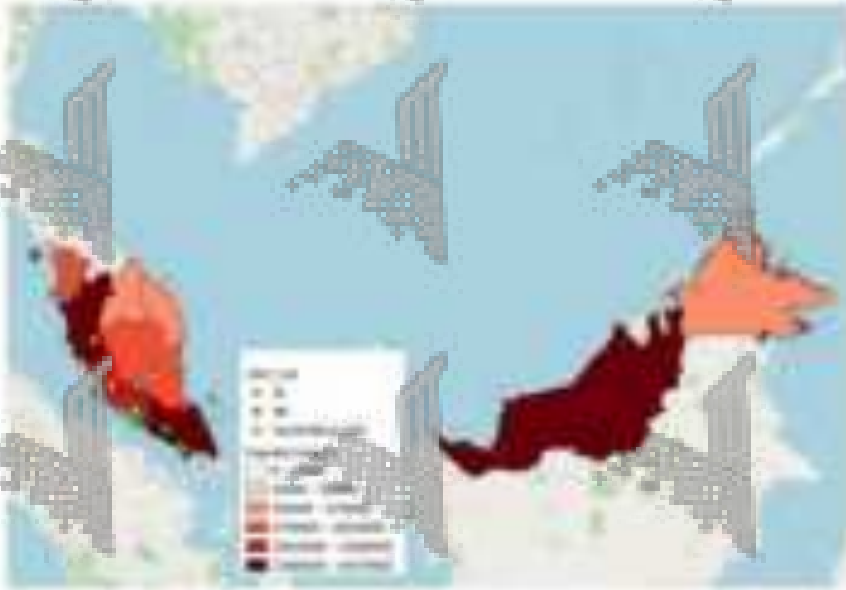
# POULTRY DISEASE SURVEILLANCE 2019 - 2021

	2019					
	Jumlah Ladang	Jumlah Positif	Prevalens Ladang (%)	Jumlah Sampel	Jumlah Positif	Prevalens Sampel (%)
AI	1075	0	0	29469	0	0
ND	1075	8	0.7	29242	165	0.6
Salmonellosis	956	113	11.8	27830	2155	7.7

	2020					
	Jumlah Ladang	Jumlah Positif	Prevalens Ladang (%)	Jumlah Sampel	Jumlah Positif	Prevalens Sampel (%)
AI	1426	0	0	37624	0	0
ND	1426	19	1.3	37466	384	1
Salmonellosis	1278	185	14.5	34574	3835	11.1

	2021					
	Jumlah Ladang	Jumlah Positif	Prevalens Ladang (%)	Jumlah Sampel	Jumlah Positif	Prevalens Sampel (%)
AI	1392	0	0	33721	0	0
ND	1392	20	1.4	33557	481	1.4
Salmonellosis	1276	143	11.2	32572	2695	8.3

# POULTRY DISEASE



Year	AI	ND	Salmonellosis
2018	6	2	6
2019	0	4	1
2020	17	2	3
2021	1	14	6
2022	2	27	7

# POULTRY PRODUCTS PRICE COMPARISON BY COUNTRY

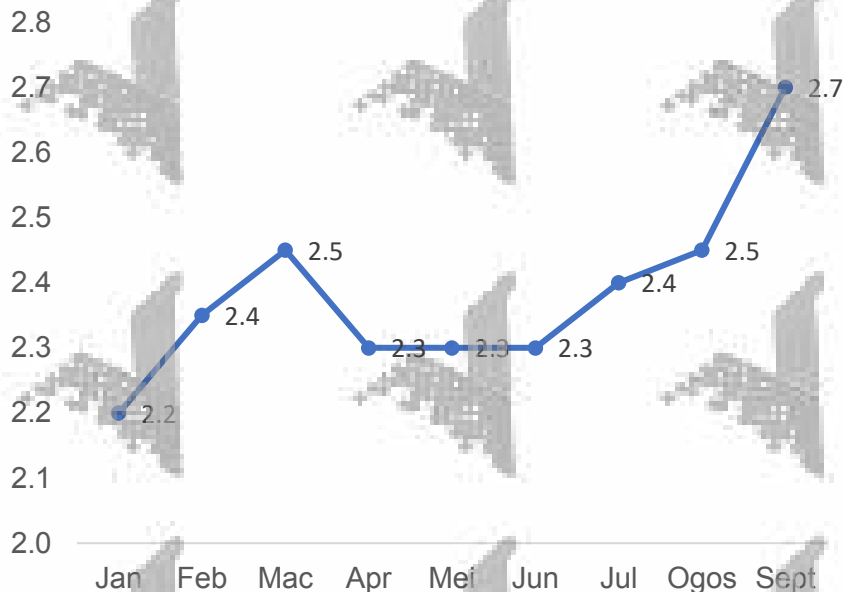
Kategori	Malaysia (USD)	Filipina (USD)	Cambodia (USD)	Vietnam (USD)	Myanmar (USD)	Thailand (USD)
Ayam Broiler (1 kg)	2.02 (RM9.40)	3.82 (RM17.76)	3.33 (RM15.47)	5.80 (RM26.95)	5.81 (RM26.99)	2.07 (RM9.60)
Ayam Farmgate (1 kg)	1.56 (RM7.20)	2.18 (RM10.14)	N/A	N/A	2.08 (RM9.66)	1.35 (RM6.25)
Telur (Large / dozen)	1.16 (RM5.40)	2.50 (RM11.63)	2.42 (RM11.24)	2.89 (RM13.43)	2.12 (RM9.85)	1.35 (RM6.27)
Telur (Medium / dozen)	1.11 (RM5.16)	1.97 (RM9.16)	2.15 (RM9.99)	2.74 (RM12.73)	2.01 (RM9.34)	1.32 (RM6.13)
Telur (Small / dozen)	1.06 (RM4.92)	N/A	1.74 (RM8.08)	N/A	N/A	1.20 (RM5.58)

# DOC PRICES

# INPUT COST

1  
3

### HARGA DOC (RM/EKOR) TAHUN 2022



Source: DVS

### Input Cost

%

**Feed**

**70%**

**DOC**

**12.8%**

Workers

**6.2%**

Drugs and Vaccine

**3%**

Utilities

**2%**

Maintenance

**1%**

Others

**5%**

### Import

m/tonne

### Grain Corn

2020

**2,845**

2021

**2,974**

### Soy Bean

2019

**1,414**

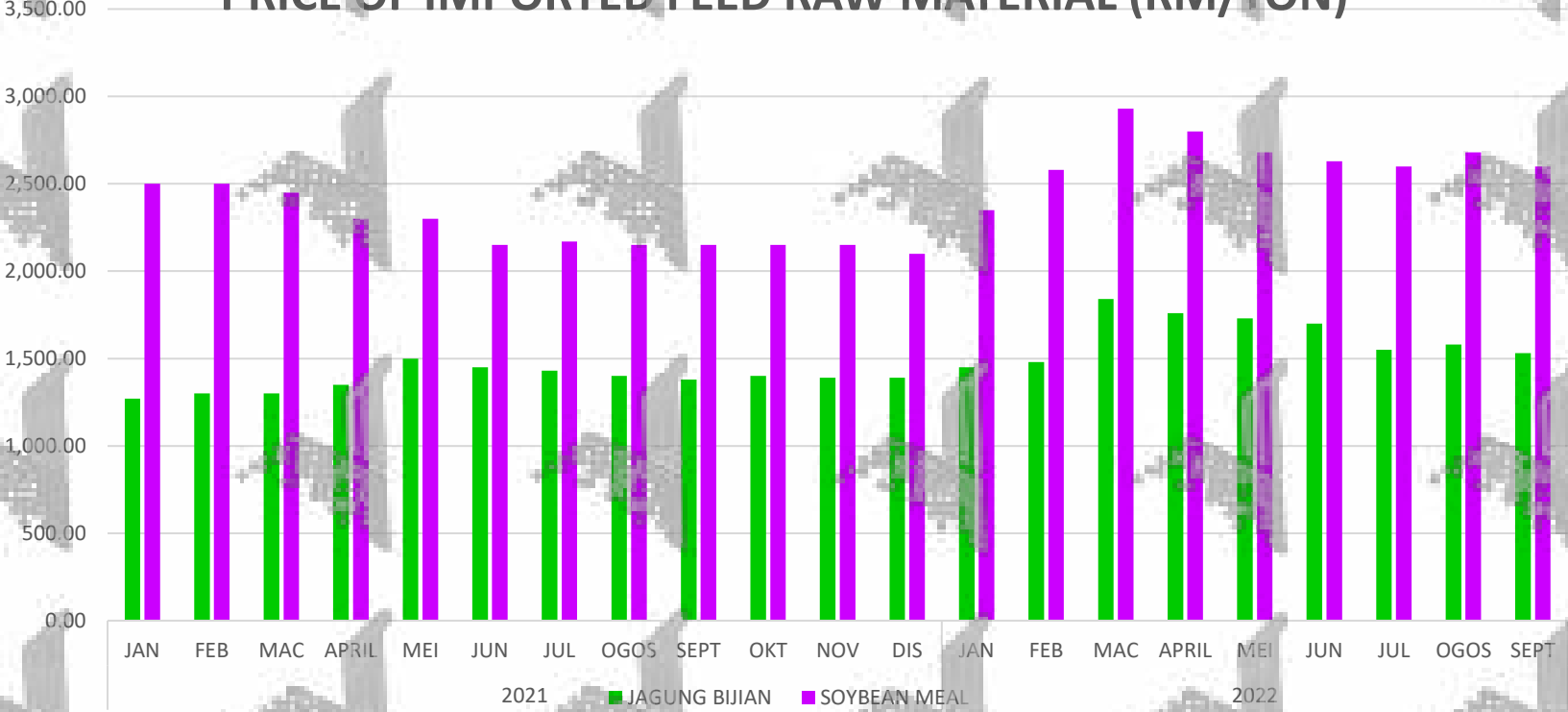
2020

**1,263**

2021

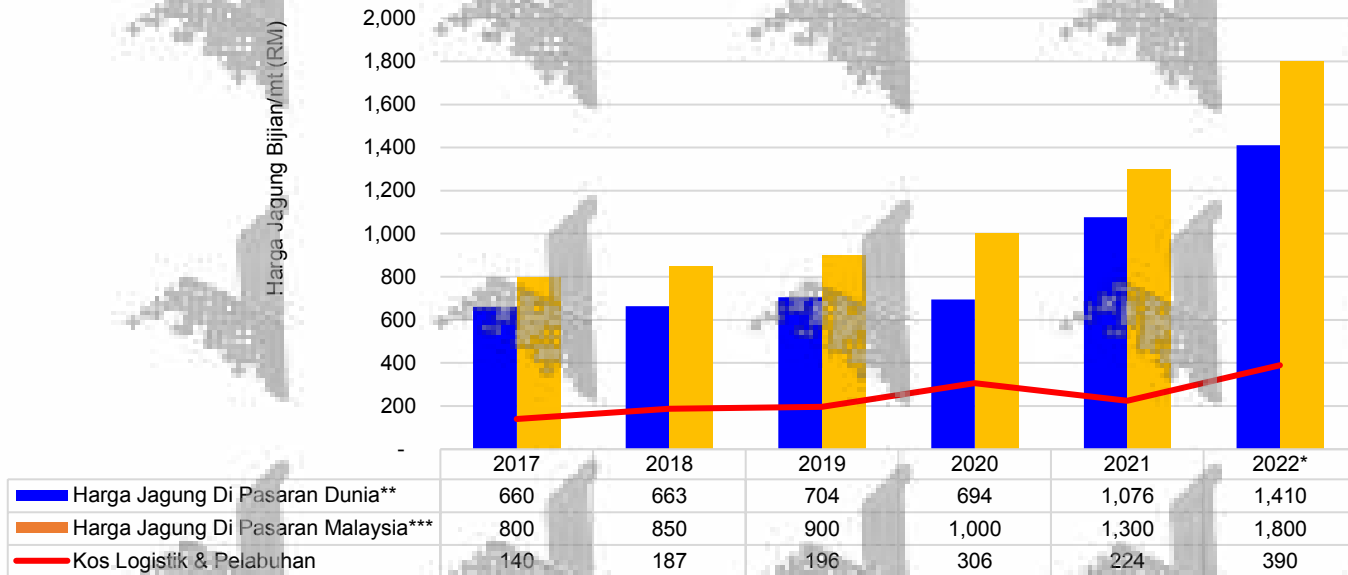
**1,300**

# PRICE OF IMPORTED FEED RAW MATERIAL (RM/TON)



Sumber : *Malaysia Feedmillers' Association (MFA)*

# GRAIN CORN PRICE COMPARISON



# Energy Tariff



ҚАЗАҚСТАН РЕСПУБЛИКАСЫНЫҢ  
ЭНЕРГЕТИКА МЕН ЭЛЕКТР ҚАУІПТЕРІ МИНИСТРЛІГІ

## Electricity tariff for Agriculture category

TARIFF CATEGORY 1		CURRENT RATES
<b>TARIFF 0-02 - MEDIUM VOLTAGE SPECIFIC SERVICE TARIFF</b>		
For the first 200 kWh (1 - 200 kWh) per month	39 sen/kWh	
For the rest of kWh (201 kWh onwards) per month	47.25 sen/kWh	
The maximum monthly charge is 10000 KZT		
<b>TARIFF 01 - MEDIUM VOLTAGE GENERAL SPECIFIC AGRICULTURE TARIFF</b>		
For total electricity demand per month	38 sen/kWh	
For kWh during the peak period	43.5 sen/kWh	
The maximum monthly charge is 10000 KZT		
<b>TARIFF 03 - MEDIUM VOLTAGE PEAK-SHIFT SPECIAL SPECIFIC SERVICE TARIFF</b>		
For kWh amount of maximum demand per month during the peak period	40.25 sen/kWh	
For kWh during the peak period	47.25 sen/kWh	
For kWh during the off-peak period	37.25 sen/kWh	
The maximum monthly charge is 10000 KZT		

**39 sen/kWh for the first 200kWh per month**

Bil.	Category	Tariff
1	Mining	38.10 sen (flat rate)
2	Industry	38 sen (first 200kWh per month)
3	Commercial	43.5 sen/kWh

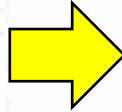




# **GOVERNMENT INITIATIVES AND WAY FORWARD**

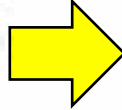
# GOVERNMENT INTERVENTIONS

Control price – farmers facing losses.



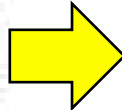
- Provide subsidy

Foreign worker problem



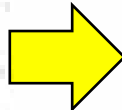
- Propose to Human Resources Ministry and Home Ministry to get special quota for agriculture sector

Lack of financial – farmers have to absorb costs due to increase of feed cost



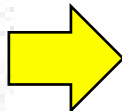
- Provide softloan 300m

Low chicken market price



- Propose to lift up export ban

Import of whole chicken



- Propose to control whole chicken import

# ON GOING GOVERNMENT EFFORTS

## Short Term

Allow importation of whole and cut chickens until domestic production stabilized.

Subsidy to broiler producers



Subsidy to layer producers



Grain Corn Industry development project



## Long Term

Establish chicken stockpiling by GLCs or agencies under MAFI to ensure food security.

Promoting the use of liquid/powdered egg to the industry, reducing competition with household users in the use of fresh eggs (table eggs).

Establish grain corn stockpile by GLCs or agencies under MAFI to guarantee food security.  
Reverse investment for grain corn and soybean





# WAY FORWARD

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Price floatation of poultry products

Less restrictive and complicated of approval of Planning Permission (KM)

More inclusive soft loan

Re-entry of foreign workers

Tax incentives for the transformation of poultry farms

Additional Abattoirs And Overseas Processing Plants

**THANK YOU**

