POLICY BRIEF

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Improving Indonesia's Poultry Competitiveness: Exploring Broiler Chicken Meat Trade Opportunities

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Key Messages

- Indonesia has a promising broiler chicken meat industry with an estimated production growth of 2.3 million tonnes over 10 years. Amidst this rising production, chicken consumption among Indonesians is also increasing, although still lower than other animal protein sources like eggs and fishes.
- The global poultry market is expected to grow considerably due to its affordability and environmental advantages. This represents a potential for Indonesia to export broiler chicken meat, which is one of the most consumed poultry products worldwide.
- This study identifies several underlying issues in Indonesia's poultry value chain that hinders food security and export opportunities. A particular problem lies in poultry inputs consisting of maize as feed and the import of Great Grandparents Stock Day Old Chick (GGPS DOC).
- In the short run, due to geographical proximity, Indonesia should consider exporting broiler chicken meat to ASEAN countries with high chicken demand, such as Singapore and the Philippines. Meanwhile, in the long run, Indonesia can target its exports to Saudi Arabia or Muslim-majority countries, considering the advantage of halal certification in Indonesia.
- This study endorses policy reforms to improve the poultry input market by introducing more open imports of maize for feed through private sectors and evaluating the GGPS DOC import procedures. The recommendations aim to solve issues that will allow the poultry industry to operate more efficiently and with lower production costs overall. Indonesians will also benefit as chicken and its products become more affordable. Similarly, lower costs will improve competitiveness of the poultry industry, which will hopefully accelerate Indonesia's efforts to tap into the regional and global poultry market.

Overview of Indonesia's Poultry Production and Consumption

Broiler chicken meat is one of Indonesia's commodities with significant growth potential, with a substantial increase of over 2.3 million tonnes – from 1.5 million tonnes in 2013 (Statistics Indonesia, 2024a) to an estimated 3.8 million tonnes of production by the end of 2024. This estimated production is expected to meet the national demand at 3.7 million tonnes by the end of 2024 (Ministry of Agriculture [MOA], 2024).

The spatial distribution of chicken meat production reveals a centralization on Java Island. Provinces like East Java, Central Java, West Java, and Banten are among Indonesia's top ten broiler chicken-producing regions (MOA, 2022). In 2021, these provinces contributed 73.7% of the nation's broiler chicken meat production. Other notable broiler chicken meat-producing provinces include North Sumatera, South Sumatera, Riau, South Sulawesi, Lampung, and Bali, though their production levels are significantly lower than those on Java Island.

Despite the substantial increase in production, the growth of broiler chicken meat consumption in Indonesia did not keep pace. The weekly average consumption per capita of chicken meat exceeded by 102.56% from 0.078 kilograms in 2013 to 0.158 kilograms in 2023 (Statistics Indonesia, 2024b). However, despite its significant growth, chicken meat consumption is still notably lower than the weekly average consumption per capita of chicken eggs, at 2.12 kilograms.

Lower consumption of chicken meat compared to other protein sources in Indonesia correlates with socio-demographic conditions. A study shows that 65.4% of Indonesians consume plant-based protein over animal protein. Specifically, poultry accounts for 8.73% of the total 34.6% animal protein consumption on Java Island, while people outside Java Island consume only 3.84% (Khusun et al., 2022). Coloza and Avendano (2019) also indicate that, despite urbanization and other socioeconomic changes, both urban and rural areas in Indonesia predominantly consume plant-based proteins. However, urbanization in Jakarta has increased the preference for animal-based proteins.

Despite the growing national aggregate consumption of chicken meat, local and socio-demographic factors play a critical role in determining consumption patterns. Continuous production growth may suggest export potential, but other factors must be considered to understand why Indonesia has not significantly boosted broiler chicken meat exports. In May 2023, Indonesia first exported live chicken to Singapore following Malaysia's chicken export restriction (Bloomberg, 2022). This was followed by frozen broiler chicken meat exports in July 2022 and layer DOC (Day Old Chicken) exports to Singapore four months later (Detik, 2022). In early 2024, Indonesia exported 50 tonnes of frozen chicken to Singapore (Kompas, 2024). Despite this, the question remains why Indonesia has not pursued higher broiler chicken meat exports given its growing production.

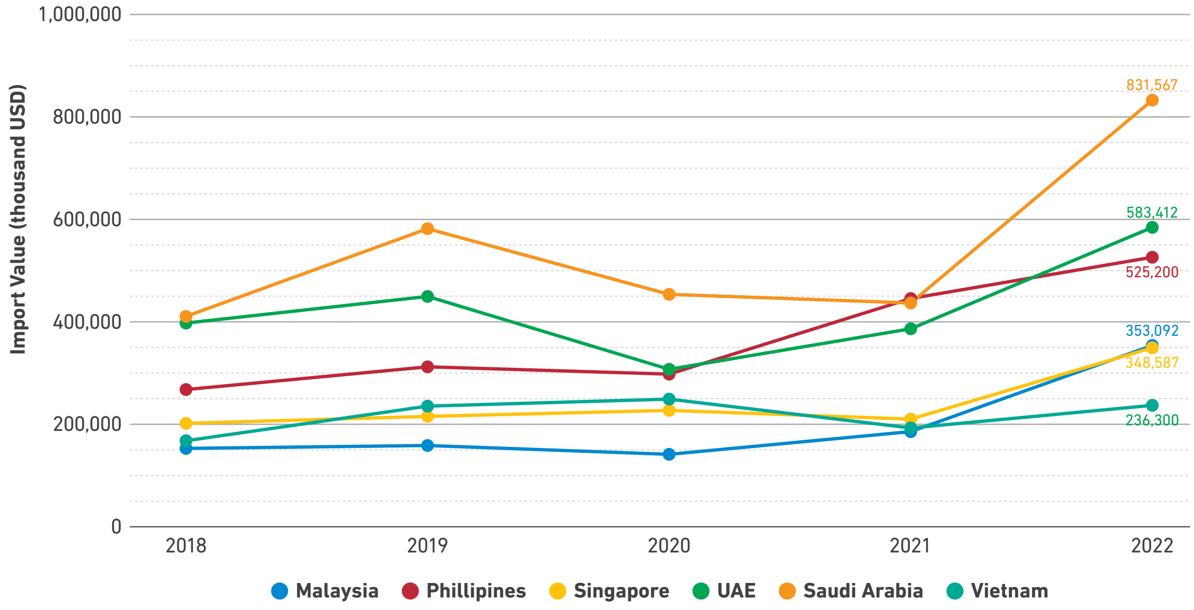
Overview of Global and South East Asia Poultry Market

The trend of poultry consumption is projected to rise with global population growth and a shift in dietary patterns from red meat to poultry, owing to its affordability and convenience. According to OECD & FAO (2024), poultry meat will account for 43% of meat protein intake globally by 2033, with middle-income countries contributing approximately 79% to meat consumption growth. This potential increase is further supported by the growing awareness of environmental impacts, as the poultry industry emits fewer greenhouse gases compared to beef.

Asian and African countries are expected to experience significant poultry consumption growth, outpacing domestic production. These regions are anticipated to contribute the most to this increase (OECD & FAO, 2021). In 2023, countries like Mexico and the Republic of Korea imported more poultry due to rising demand (FAO, 2023), while Muslim-majority countries such as Saudi Arabia, the United Arab Emirates, and Iraq are among the top ten poultry importers globally (ITC Trade Map, 2024). The high expected chicken consumption in these countries suggests a potential export market for Indonesia, especially in Muslim-majority nations due to similar halal requirements.

Despite the rising production trend, Indonesia's poultry exports remain limited, totaling only 597 tonnes in 2023 (ITC Trade Map, 2024). Among poultry products, frozen broiler chicken cuts (HS Code 020714) are highly imported worldwide. In 2023, the import value of frozen broiler chicken cuts accounted for 52.76% of global poultry imports. **Figure 1** illustrates the import value of Indonesia's potential export destinations in Southeast Asia and the Middle East.

Figure 1.
Import Value of Frozen Broiler Chicken Cuts in Southeast Asian and Middle Eastern Countries 2018 - 2022 (ITC Trade Map, 2024).

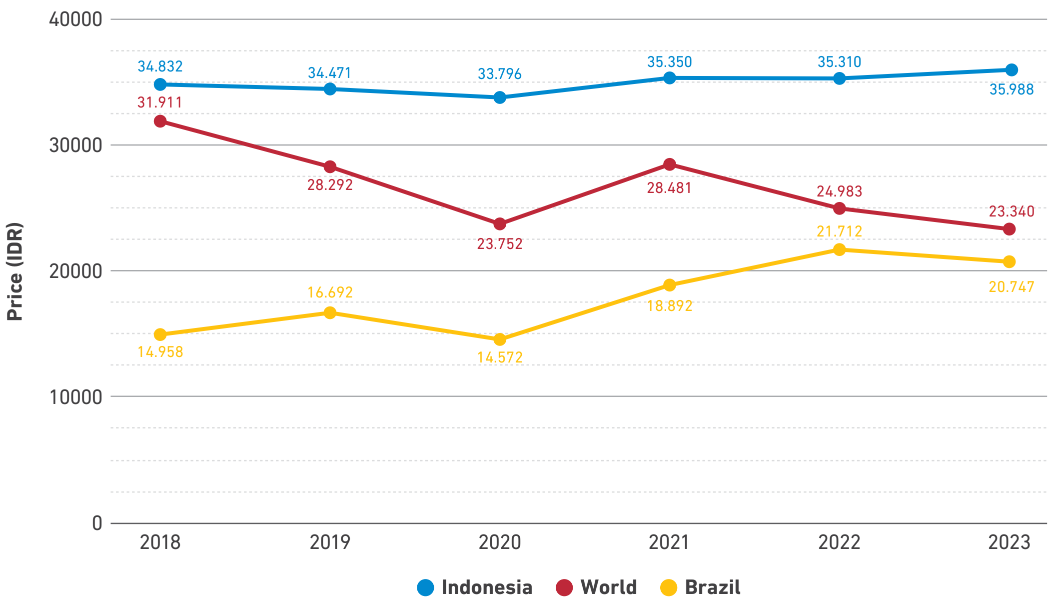


As one of the largest importers of frozen chicken cuts, Saudi Arabia primarily sources its supply from Brazil, which contributes 91.4% of Saudi Arabia's total frozen chicken cuts imports (ITC Trade Map, 2024). The high import volume is linked to insufficient domestic production, with Saudi Arabia's domestic chicken production in 2016 accommodating only 50.3% of local demand (Alderiny et al., 2020). Saudi consumers prefer lighter chickens (900-1,000 grams) for restaurants and hotels and are generally willing to pay higher prices for guaranteed halal status (USDA, 2021). Given that both Indonesia and Saudi Arabia are Muslim-majority countries, Indonesia's well-established halal certification process offers a strategic advantage for exporting broiler chicken meat to Saudi Arabia.

Within Southeast Asia, the Philippines, Malaysia, Singapore, Vietnam, and Cambodia dominate poultry import values (ITC Trade Map, 2024). The Philippines presents a notable export opportunity due to an anticipated shortfall in national production capacity, necessitating imports of around 465,000 tonnes in 2024 (PCAARRD, 2024). Malaysia primarily imports broiler chicken meat from Thailand, the leading poultry exporter in ASEAN, and ranked as the only Asian country among the top ten live poultry exporters globally in 2023 (OEC, 2022). Both Malaysia and Thailand are significant competitors for Indonesia's export opportunities in live poultry and broiler chicken meat.

Singapore remains a key destination for Indonesia's poultry exports, having successfully imported live and frozen chicken as well as DOCs from Indonesia in recent years. The proximity of Singapore makes it advantageous for exporting perishable commodities like chicken. Singapore led Asian countries in live chicken imports in 2023 (ITC Trade Map, 2024) and imports most of its frozen broiler chicken cuts from Brazil, while Thailand supplies the bulk of preserved or processed poultry (HS Code 160232) (Government of Canada, 2024). Indonesia could further penetrate Singapore's market, given the existing trade agreements and compliance with export requirements. However, the full extent of Indonesia's export potential remains untapped.

Figure 2.
Comparison of Broiler Chicken Meat Price in Indonesia, Brazil, and Worldwide (PIHPS 2024, World Bank 2024, CEPEA 2024, processed)



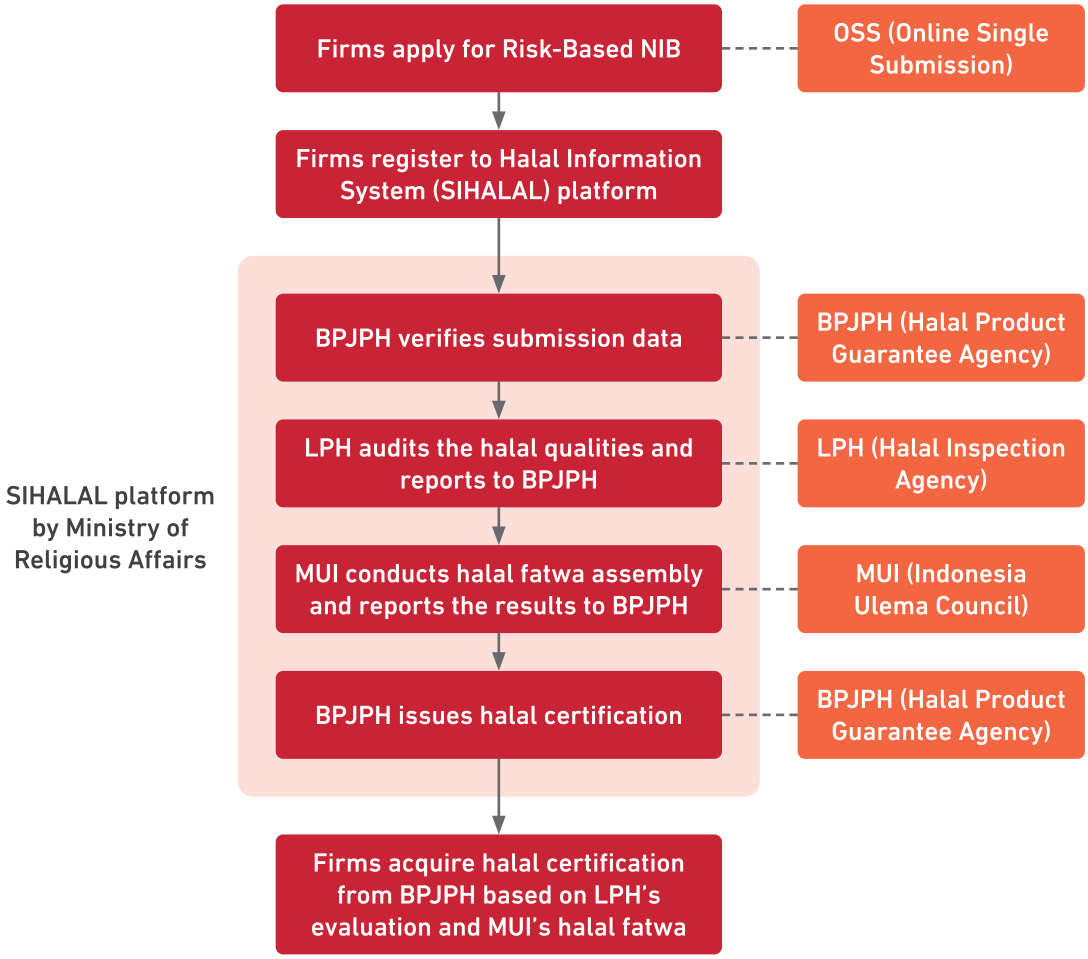
To understand Indonesia's position in the global chicken export market, it is important to compare it with Brazil, which dominates imports in Singapore and Saudi Arabia. From a price perspective, Indonesia's chicken is more expensive than Brazil's, which is close to the global average. This suggests that Indonesia needs to enhance the efficiency of domestic chicken production to compete globally.

However, despite the price disadvantage, Indonesia has a strategic edge in exports to Saudi Arabia, one of the largest chicken importers. Indonesia's Halal Product Guarantee Agency (*Badan Penyelenggara Jaminan Produk Halal* or BPJPH) was recognized by Saudi Arabia's Saudi Food and Drug Authority (SFDA) as a halal certification body in June 2024 (Khoiriah et al., 2024; SFDA, 2024). Halal certification is a significant technical barrier for Brazil in exporting chicken meat to Muslim-majority countries (Aranda et al., (2018)). Given Brazil's status as a leading broiler chicken meat exporter, this presents an opportunity for Indonesia to expand exports to Saudi Arabia and other Muslim-majority countries.

Indonesia's halal certification process is streamlined through SIHALAL, an online platform provided by the Ministry of Religious Affairs (MORA). SIHALAL integrates the certification process across three agencies: Halal

Product Guarantee Agency (BPJPH), Halal Inspection Agency (*Lembaga Pemeriksa Halal* or LPH), and Indonesia Ulema Council (*Majelis Ulama Indonesia* or MUI). This single-window platform simplifies the halal certification process for potential broiler chicken meat exporters by minimizing administrative hurdles.

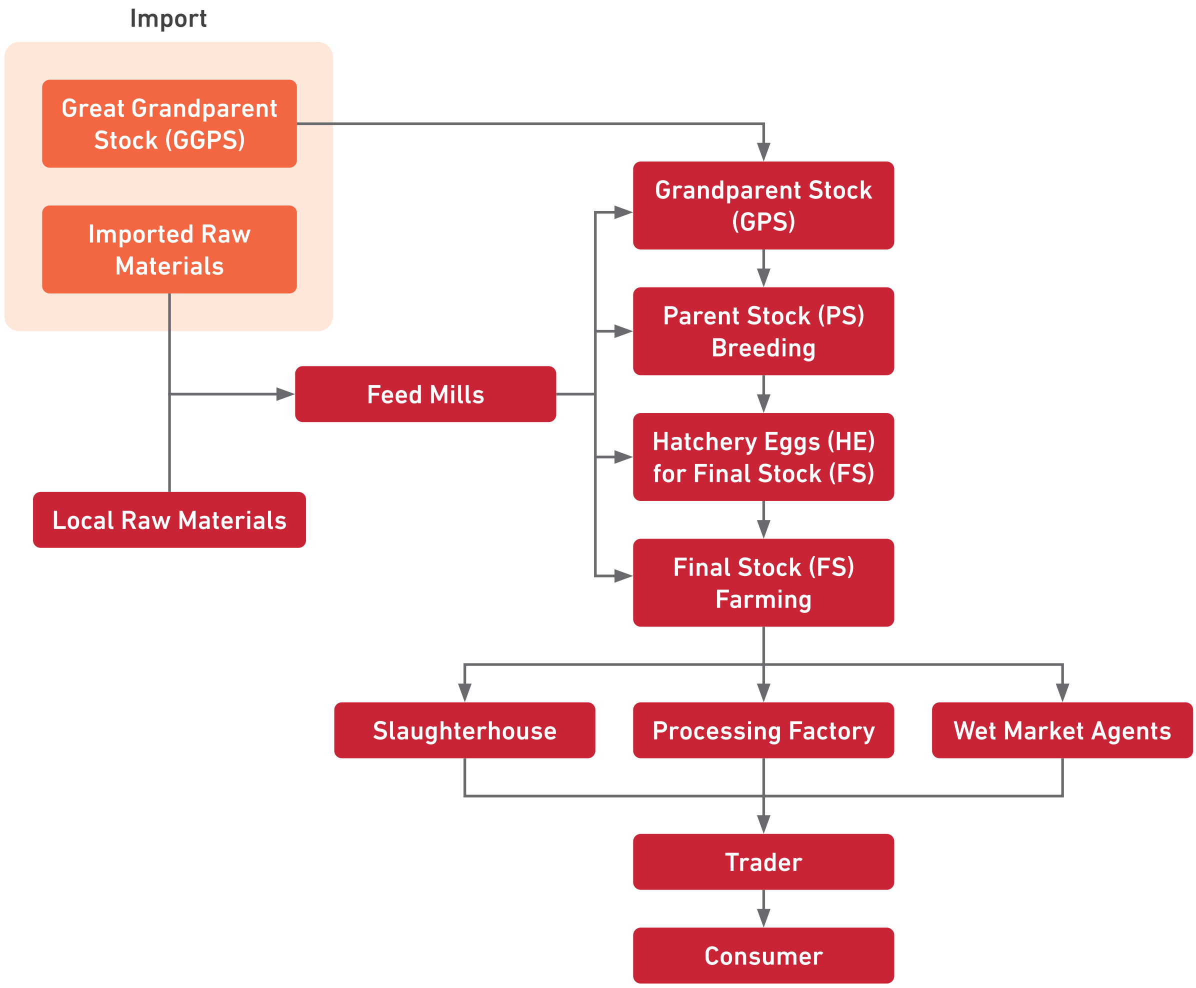
Figure 3.
Halal Certification Process in Indonesia (BPJPH 2024, processed)



Exploring Indonesia's Poultry Value Chain

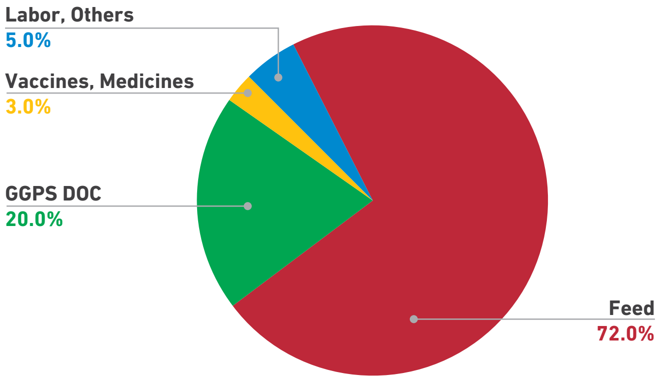
Understanding the value chain of broiler chicken meat is crucial for identifying strategies to enhance Indonesia's export potential. Indonesia's broiler chicken value chain spans from upstream to downstream stages. **Figure 4** illustrates the process of obtaining poultry inputs through to the procedures at the consumer level, highlighting the necessary input material sources.

Figure 4.
Broiler Chicken Value Chain (USAID 2013, Interview 1 & 2, processed)



The broiler chicken value chain generally consists of four generations: Great Grandparent Stock (GGPS), Grandparent Stock (GPS), Parent Stock (PS), and Hatching Eggs (HE) to produce Final Stock (FS). GGPS breeding produces GPS, which in turn produces PS. PS breeding ultimately yields the day-old chicken (DOC) at the FS level. Once grown by FS farmers, broilers are transported from farm gates to slaughterhouses and processing factories, or picked up by agents for wet markets. At the wet markets, retailers or traders handle the slaughter before selling the chicken to consumers. Different types of grown FS broilers are sold through a network of agents, each taking a margin along the way (USAID, 2013).

Figure 5.
Broiler Chicken Cost Structure (Interview 1)

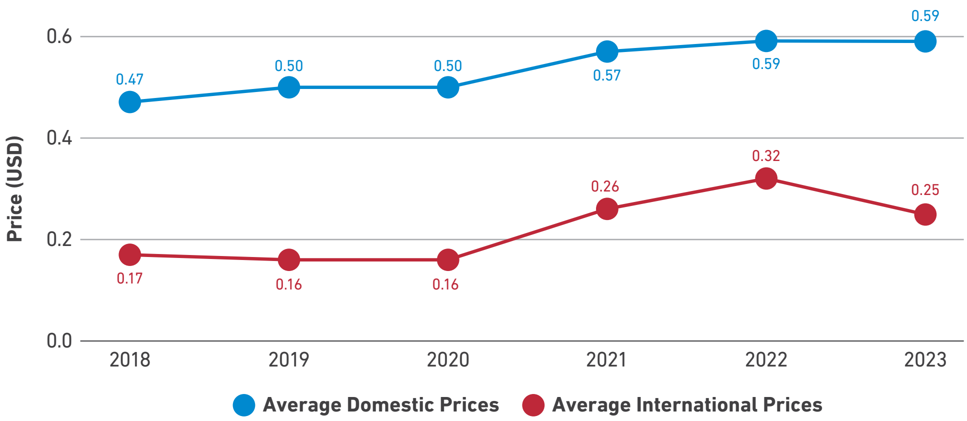


Another crucial component of Indonesia's broiler chicken value chain is feed, used from PS production to FS farming. According to Indonesia's poultry feed association, feed accounts for 72% of the broiler chicken farm cost structure (Interview 1). In terms of quantity, chicken feed comprises 64% locally sourced materials and 36% imported materials. Maize, sourced locally, constitutes the largest overall feed component (45%), while soybean meal is the primary imported material (25%). Despite the lower quantity of imported materials, they are more expensive per unit than locally sourced ones, underscoring the need to stabilize raw material supply and pricing.

The poultry industry has responded to feed cost structures by using alternative feed materials, adapting different feed final forms, and adjusting feed composition through the Least Cost Diet Formulation. However, factors like raw material prices remain uncontrollable, affecting feed availability and stability (Interviews 1 & 2). **Figure 6** highlights the higher cost of domestic maize compared to international prices, emphasizing the need to improve domestic maize competitiveness, especially given its use as feed and for consumption.

The demand for maize is substantial, necessitating actions to ensure its competitiveness. The Ministry of Agriculture (MOA) has implemented a maize seed assistance program to boost productivity. However, further improvements are needed to optimize domestic price competitiveness.

Figure 6.
Domestic and International Maize Prices
(National Food Agency, Ministry of Trade, World Bank, processed)



This study highlights two key components of Indonesia's poultry value chain that contribute to its outward-looking challenges. **The first component is maize, a crucial feed material**. Indonesia's maize for feed relies heavily on domestic production and imports, limited to State-Owned Enterprises (SOEs). Feed costs account for up to 72% of overall broiler production costs, making efficiency crucial. However, high reliance on domestic maize, coupled with price fluctuations and the need to meet specific water content standards (usually under 15%), hinders cost efficiency. Policy issues also affect maize imports, as SOEs can import maize for feed, but the private sector cannot. This restrictive approach limits supply avenues, affecting production cost efficiency as raw material prices continue to rise.

The second component is the Great Grandparents Stock Day Old Chick (GGPS DOC), which plays a crucial role in the poultry process as the parental seedling for broiler chickens. Indonesia's GGPS DOC is sourced solely from imports, mainly from the United States and Europe (USAID 2013 & Interview 1). Hence, import restrictions on GGPS DOC can introduce problems, further complicated by miscalculations in the national production plan by the MOA. Data inaccuracies often lead to oversupply in the breeding process, forcing the MOA to cut early Hatching Eggs (HE) to stabilize supply and prices. While surplus chicken production could benefit Indonesia by enabling value-added products and exports, early cutting highlights inefficiencies and results in wasted production costs.

Policy Recommendations to Improve Indonesia's Poultry Competitiveness

1. Improving Maize for Feed Use Access

The Ministry of Trade (MOT) could consider loosening regulations to allow international trade through maize imports for feed use. This could alleviate the pressure of domestic demand and rising prices. The increasing price of maize for feed use can create a domino effect along the poultry value chain, leading to higher prices for end consumers and hindering access to affordable protein sources.

MOT Regulation No. 8/2024 on Imports stipulates that maize for feed use (HS Code 1005.90.99) can only be imported through SOEs with a General Importer Identification Number (*Angka Pengenal Impor Umum* or API-U). The exclusion of the private sector from maize imports has led to challenges in obtaining this crucial feed material. Removing trade barriers and allowing private sector participation in maize imports could help stabilize feed prices, reduce costs, and enhance Indonesia's competitiveness in the poultry market.

2. Flexible, Transparent, and Open GGPS DOC Supply

According to MOA Regulation No. 32/2017 on the Provision, Distribution, and Supervision of Broiler Chickens, breeders can produce DOC for GPS, PS, and FS. To control DOC supply, MOA refers to the national production plan, formulated by an analyst team appointed by the Directorate General of Livestock and Animal Health. This plan, which is valid for a year, is often based solely on supply and demand analysis from the previous year. As a result, it may not adequately reflect or accommodate the market dynamics of the current year. Due to this limitation, the MOA has sometimes issued instructions to prematurely reject HE due to oversupply during the breeding phase.

To improve the accuracy of supply and demand data, the national production plan analysis needs to be available to key stakeholders, including business associations and the private sector, ensuring the data is timely and accurate according to ongoing market developments. Removing administrative requirements, such as recommendation letters, can potentially facilitate broiler business players from exporting.

The MOA Instruction on Cutting HE and Early Rejection of PS requires HE and PS breeding companies to cut their stocks within a specified amount during a certain period. This decree serves as a stopgap measure that can be minimized by evaluating the national production plan for DOC imports. A flexible and appropriate DOC import plan can reduce bureaucratic and administrative hassles and optimize production costs by preventing waste due to oversupply.

Despite the restrictive issues within the value chain, MOT Regulation No. 8/2024 and MOA Regulation No. 32/2017 permit DOC imports for poultry production, indicating that the government does not limit DOC procurement solely to domestic sources. This non-restrictive approach reveals a positive outlook regarding international trade that allows private sector participation in imports.

3. Facilitating Halal Certification for Exporters

To reduce input access barriers, Indonesia should focus on improving its broiler chicken meat competitiveness in Saudi Arabia and other Muslim-majority countries through halal certification. The Indonesian government has established a significant bilateral agreement with Saudi Arabia, with mutual recognition of Indonesian halal certification since June 2024. This agreement addresses one of the major technical barriers to exporting broiler chicken meat to Saudi Arabia, one of the largest importers. MORA must ensure the ease of acquiring halal certification while adjusting to global halal standards to maximize Indonesia's broiler chicken meat export potential.

Conclusion

This study suggests that protectionist approaches hinder Indonesia's poultry competitiveness and broiler chicken meat export potential.[1] Producers can access cheaper materials, especially feed components and DOC, through more open trade policies. Improving the national production plan with a market dynamics approach is necessary to serve as a reference for DOC imports and supply and demand stabilization. Lower input costs are expected to create lower consumer prices, improving access to animal protein, particularly for those with lower incomes. Higher prices and difficulty in accessing chicken could impede government efforts to achieve national food security and outward export opportunities for economic value enhancement. Indonesia needs to address maize import restrictions by removing trade barriers for the private sector and utilizing the national production plan while designing a work plan for export trajectory.

In the short run, exporting poultry products to ASEAN countries is a viable option. With its geographical advantage, Indonesia can continue exporting DOC and live birds while improving production quality to enable broiler chicken meat exports, which have higher demand and added value. This will open more opportunities for export to ASEAN countries with high broiler chicken consumption, such as Singapore and the Philippines.

In the long run, Saudi Arabia and other Muslim-majority countries are viable options due to Indonesia's established halal certification procedures. Processed chicken exports are more suitable for Middle Eastern countries, considering the durability and quality of those goods compared to broiler chicken meat. Developing mutually accepted halal certification agreements with other Muslim-majority countries can also expand Indonesia's chicken export reach.

[1] Protectionist trade policies have been pursued to protect small farmers and their welfare. However, as CIPS and other scholars have shown (see, for example, Patunru and Respatiadi (2017), World Bank (2016)), these policies have not only been ineffective, they are even detrimental to small farmers who are net consumers of food crops. A meaningful improvement in farmer's welfare can be achieved by employing a set of policies that take into account the complexity of rural livelihoods and accordingly adjusting the relevant policies and programs, such as subsidies, social protection, and land use planning (Alta et. al., (2023)).

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Interview 2 - *Masyarakat Ilmu Perunggasan Indonesia* (MIPI) (2023, July 7). Personal communication.

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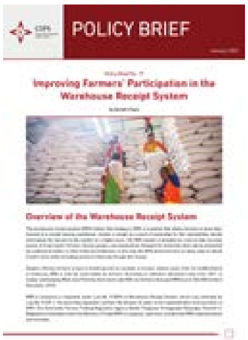

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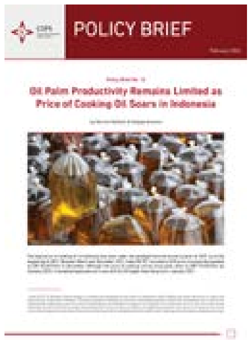

Oil Palm Productivity Remains Limited as Price of Cooking Oil Soars in Indonesia

Enhancing Inclusion in the National Digital Literacy Index: From Measurement to Empowerment

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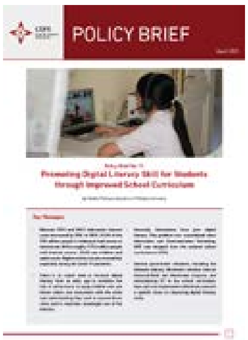
Addressing the Employability of SMK Students through Improved English Curriculum

Parent's Perception on Face-to-Face Learning



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ABOUT THE CENTER FOR INDONESIAN POLICY STUDIES

Center for Indonesian Policy Studies (CIPS) is a strictly non-partisan and non-profit think tank providing policy analysis and practical policy recommendations to decision-makers within Indonesia's legislative and executive branches of government.

CIPS promotes social and economic reforms that are based on the belief that only civil, political, and economic freedom allows Indonesia to prosper. We are financially supported by donors and philanthropists who appreciate the independence of our analysis.

KEY FOCUS AREAS:

Food Security & Agriculture: To enable low-income Indonesian consumers to access more affordable and quality staple food items, CIPS advocates for policies that break down the barriers for the private sector to openly operate in the food and agriculture sector.

Education Policy: The future of Indonesia's human capital need to be prepared with skills and knowledge relevant to the 21st century. CIPS advocates for policies that drive a climate of healthy competition amongst education providers. Such competition will drive providers to constantly strive to innovate and improve education quality for the children and parents they serve. In particular, CIPS focuses on the improvement of operational and financial sustainability of low-cost private schools who serve the poor.

Economic Opportunities: CIPS advocates for policies that expand economic involvement and opportunities for Indonesian entrepreneurs and businesses; as well as for policies that open wider opportunities for lowincome Indonesians to access decent incomes and create wealth.

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