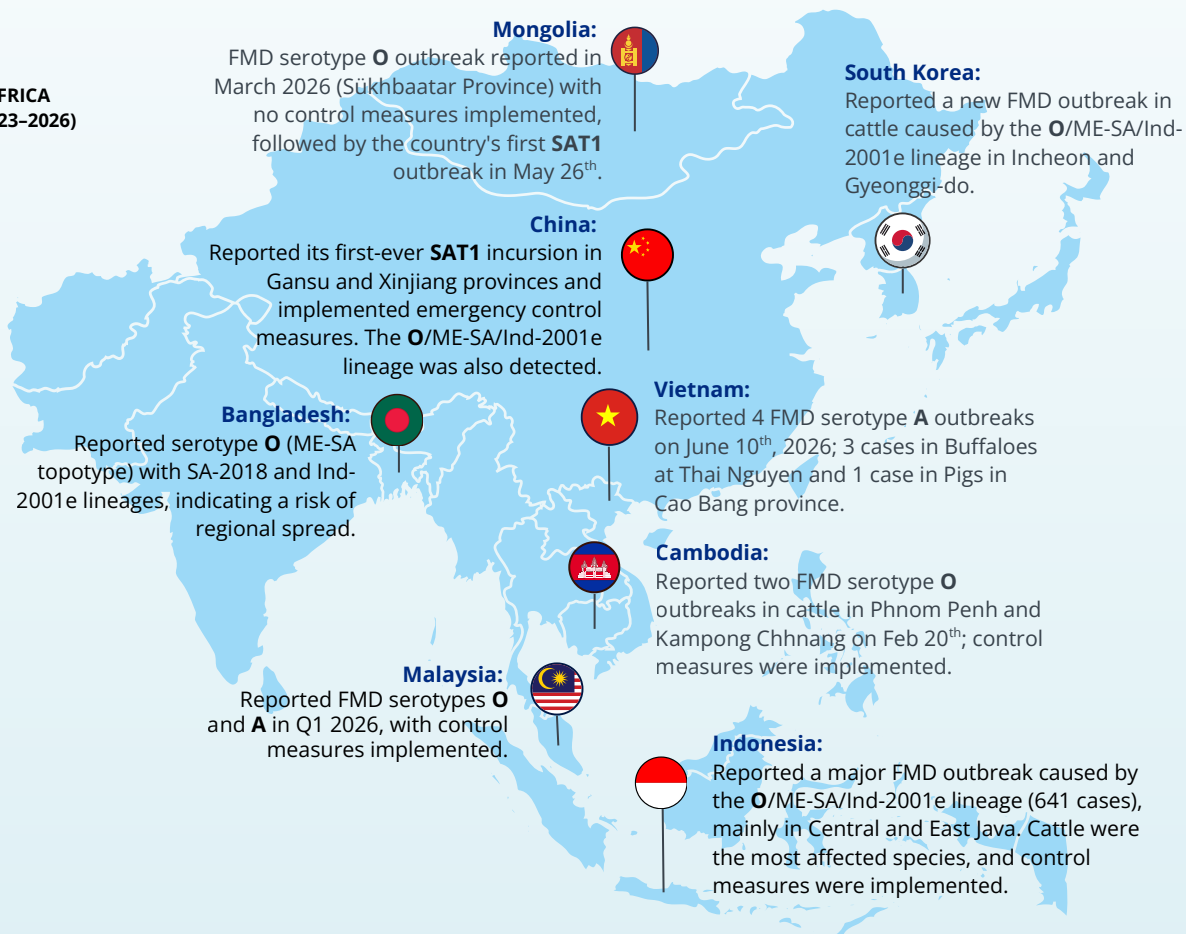


Biogénesis Bagó Newsletter

THE FMD FRONTIER IN ASIA

The Expert insights on Foot-and-Mouth Disease, market trends, and technical strategies across Asia

COUNTRIES OUTSIDE AFRICA REPORTING FMD SAT1 (2023–2026)



ASIA FOOT-AND-MOUTH DISEASE (FMD) NEW OUTBREAKS IN FIRST HALF 2026

Asia is divided into two WOA endemic pools: **Pool 1 (Southeast, East, and Central Asia)** and **Pool 2 (South Asia)**, where FMD serotypes **O**, **A**, and **Asia 1** continue to circulate.

In Pool 1, the most notable event was the first-ever detection of **SAT1** in **China** and **Mongolia**, creating a new regional threat. Meanwhile, **O/ME-SA/Ind-2001e** caused a sharp increase in outbreaks in **Indonesia** (641 outbreaks in February) and re-emerged in **South Korea** after nine months without cases. Serotype **O** activity also continued in **Cambodia** and **Mongolia**, while **Malaysia** reported both **O** and **A**.

In Pool 2, **Bangladesh** confirmed serotype **O** (SA-2018 and Ind-2001e), while India continued large-scale vaccination campaigns.

Overall, serotype **O** remained dominant across Asia, while serotypes **A** and **SAT1** emerging as a key concern in Asia, highlighting the need for enhanced surveillance, biosecurity, and vaccine preparedness across the region.

GLOBAL FMD SITUATION – FIRST HALF 2026

The FMD situation in first half of 2026 was highly complex and dynamic, driven by the spread of virus strains into new regions. Notably, serotype **SAT1** expanded beyond its traditional range, reaching Northwest China, Mongolia and Europe. Meanwhile, the **O/ME-SA/Ind-2001e** strain surged in Asia, especially in Indonesia, and spread to South Korea, increasing regional transmission risks.

In addition, South Africa reported widespread SAT serotype outbreaks, resulting in hundreds of cases. In response, many countries implemented large-scale vaccination campaigns to control the disease.

◆ WESTERN EURASIA / NEAR EAST (POOL 3)

The exotic **SAT1/III** has spread rapidly across multiple countries, including Turkey, Azerbaijan, Iraq, Israel, Lebanon, Jordan, and Syria. Turkey has reported 46 outbreaks, while Iraq has reported 179 outbreaks. In response, Turkey (15.7 million animals), Azerbaijan (5 million animals), and Syria have launched large-scale emergency vaccination campaigns using polyvalent vaccines containing the SAT1 strain.

◆ AFRICA

North and Eastern Africa (Pool 4): This region shows complex circulation of multiple serotypes, with Kenya reporting types **O**, **A**, **SAT1**, and **SAT2** simultaneously. In North Africa, Algeria recorded new type **O** outbreaks, while Tunisia urgently added **SAT1** to its vaccines due to high introduction risk.

West/Central Africa (Pool 5): Genetic sequencing analyses from Ghana and Nigeria confirmed the circulation of type **O** (EA-3), type **A**, and **SAT2** (topotypes/lineages V and VII) strains.

Southern Africa (Pool 6): remains the main hotspot, with Lesotho reporting its first ever FMD case (**SAT1**), resulting in the loss of its disease-free status. South Africa is heavily affected, with over 600 **SAT2** outbreaks and the co-circulation of **SAT1** and **SAT3**. Meanwhile, Botswana and Eswatini have also reported new **SAT1** outbreaks in border areas.

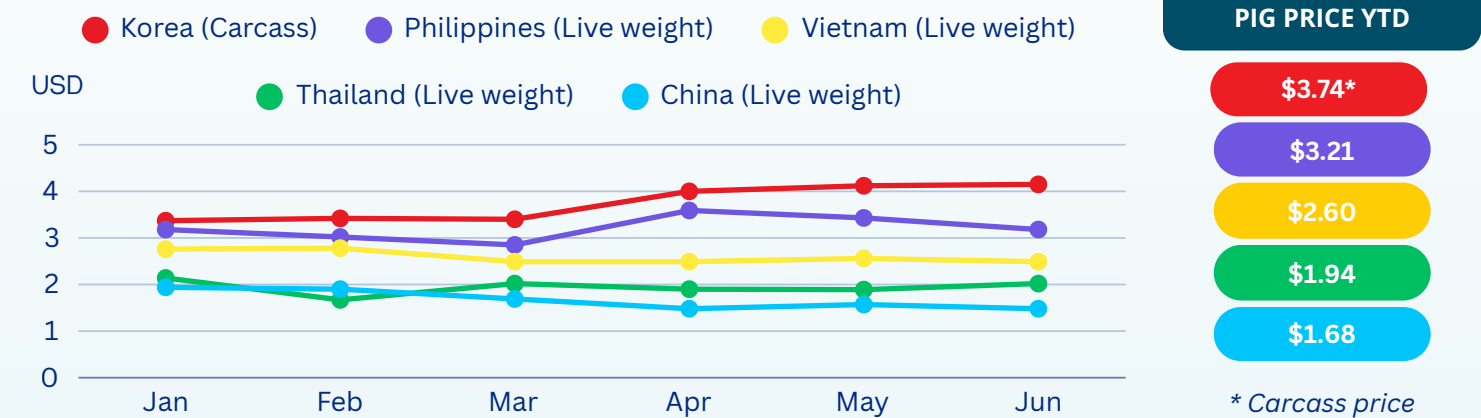
◆ SOUTH AMERICA (POOL 7)

No new outbreaks of foot-and-mouth disease were reported in South America.

◆ EUROPE

SAT 1 reaches Europe. Cyprus reported 48 **SAT1** outbreaks affecting at least 50 farms (including pig farms), while Greece reported 16 outbreaks on Lesbos Island, its first FMD cases since 1994. Both countries responded with vaccination campaigns and strict disease control measures to contain the spread.

2026 PIG PRICE TREND



Asian Pork Markets are diverging: prices remain low in China and Thailand amidst excess supply and soft demand; elevated prices in the Philippines and Vietnam due to constrained supply; while South Korea, Japan, and Taiwan maintain stable prices supported by balanced supply and demand.

Swine producers face multiple pressures: disease risks (ASF, FMD), rising feed and energy costs, supply-demand imbalances, trade disruptions, and weak consumer demand amidst inflation and geopolitical uncertainty. Improving profitability requires stronger biosecurity and disease control, optimized feed and energy cost management, and an efficient production system driven by scaling up operations, leveraging on AIoT and making data-driven decisions.

SWINE INDUSTRY NEWS & OUTLOOK

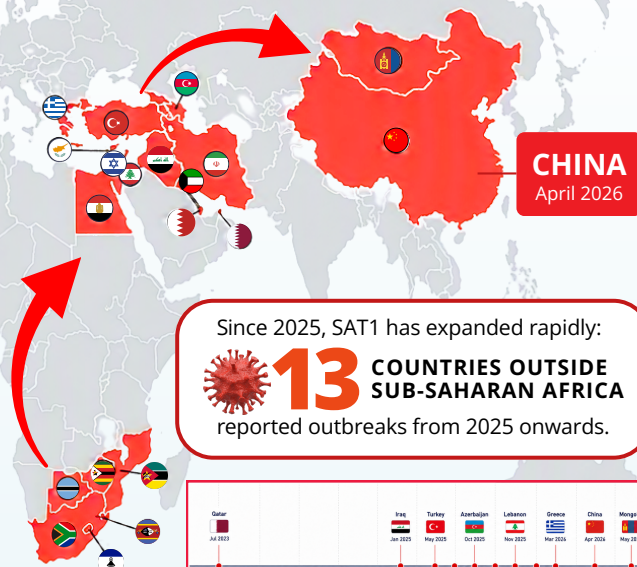
- China: Oversupplied pork market, undergoing sow-herd minimization, amidst profitability pressure**
China is facing pork price pressure due to oversupply, weak demand, and better sow performance. The government and industry are further reducing the sow herd, admist better sow productivity, to rebalance supply. Prices are expected to stabilize and recover gradually in second half of 2026 as supply tightens.
- Thailand: Market is correcting after oversupply following herd recovery**
Thailand is experiencing declining pork prices due to oversupply, following a successful herd recovery, however exceeding stable domestic demand. Producers are rebuilding cautiously while improving biosecurity and production efficiency. Supply-demand balance is expected to normalize gradually.
- Vietnam: Tight supply market with strong demand, while facing persistent disease pressure.**
Vietnam maintains high pork prices driven by constrained supply from ASF and herd rebuilding challenges. The industry is shifting toward large-scale biosecurity and modern farm production systems. Production is expected to recover in second half of 2026, with gradual price softening.
- Philippines: Supply-constrained market, heavily dependent on imports, with high pork prices.**
The Philippines continues to experience tight pork supply and high prices due to slow ASF recovery. Authorities are increasing imports while implementing ASF strategies and support herd rebuilding. Imports will remain high and prices firm, with gradual improvement depending on ASF control success.
- South Korea: Balanced but high-cost production market under pressure.**
South Korea maintains stable supply-demand balance but faces high feed and production costs. Producers are focusing on biosecurity and cautious expansion while managing cost pressures. The market is expected to remain stable, but margin is sensitive to increasing costs.
- Japan: Stable but import-reliant market with weak consumption growth.**
Japan's pork demand remains sluggish with continued reliance on imports. The industry balances domestic production with imports while focusing on efficiency. Consumption is expected to remain flat, with prices supported by import dependence and cost pressures.
- Taiwan: Highly stable and biosecurity premium market with export potential.**
Taiwan maintains a stable pork market supported by strong biosecurity and ASF-free status. The industry is leveraging its disease-free status to expand export opportunities. Outlook remains positive with growth potential driven by trade and premium positioning.

SAT1 FMD INCURSION IN ASIA: IS IT TIME TO STRENGTHEN PREPAREDNESS?

The recent detection of SAT1 FMD in China and Mongolia highlights the continuing geographical expansion of this historically African serotype.

Since 2025, SAT1 outbreaks have been reported in multiple countries outside sub-Saharan Africa, demonstrating its rapid transboundary spread.

For countries at risk, preparedness should begin before local detection occurs. Strengthening biosecurity, surveillance, contingency planning, and emergency response capacity is essential to reduce the likelihood of virus introduction and mitigate the impact of potential outbreaks.



KEY ELEMENTS OF FMD EMERGENCY PREPAREDNESS

1

TIGHTEN BORDER AND IMPORT CONTROLS

To prevent virus introduction



- Strict controls on high risk imports
- Stringent border disinfection of vehicles, equipment, and animal transport
- Stop illegal animal movements and smuggling
- Enforce laws with high penalties for offenders

2

MAXIMIZE FARM BIOSECURITY (THE "LOCKDOWN" PHASE)

To reduce farm exposure risk



- Controlled access to farms and livestock facilities
- Cleaning and disinfection of vehicles, equipment, and personnel
- Shower and change into farm-dedicated boots and clothing before entry
- Quarantine and monitoring of newly introduced animals

3

STRENGTHEN SURVEILLANCE AND EARLY DETECTION

For rapid outbreak identification

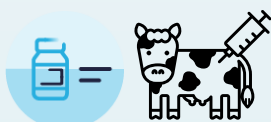


- Active and passive disease surveillance programs
- Immediate reporting of suspected FMD cases and outbreaks
- Strengthened FMD diagnostic and serotyping capacity of laboratories
- Traceability systems to support outbreak investigations

4

ESTABLISH EMERGENCY VACCINATION PREPAREDNESS

To establish immunity before widespread transmission



Vaccination should be integrated into national contingency plans:

- Maintain access to high-quality vaccines matched to circulating strains
- Develop emergency vaccination strategies for high-risk areas
- Ensure vaccine availability through antigen and vaccine banks
- Prepare operational plans for rapid deployment when required

5

ACTIVATE RAPID RESPONSE PROTOCOLS

To contain outbreaks quickly



In the event of a suspected outbreak:

- Isolate affected animals immediately
- Restrict animal movement within affected zones
- Collect and submit samples for RT-PCR testing, genome sequencing, phylogenetic analysis, and vaccine matching.
- Implement zoning, cleaning, and disinfection measures to control disease spread.
- Coordinate response activities across veterinary authorities and stakeholders



Preparedness is the most effective defense against FMD. Strengthening biosecurity, surveillance, emergency vaccination capacity, and rapid response systems before an outbreak occurs is essential to protect animal health, livestock production, and national disease control.



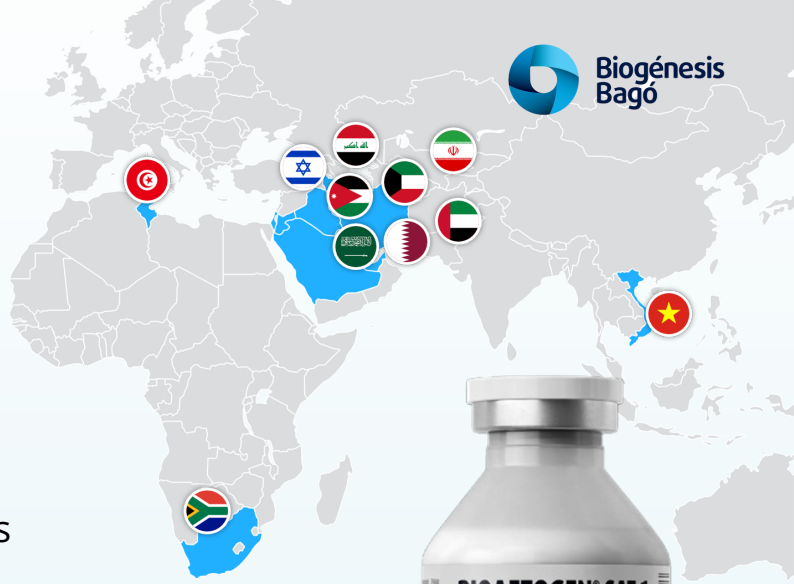
BIOAFTOGEN® SAT1

TRUSTED FOR GLOBAL FMD
EMERGENCY RESPONSE

BIOAFTOGEN® SAT1 is part of the **BIOAFTOGEN® PLATFORM** of Biogénesis Bagó's world-class FMD vaccines.

As SAT1 continues to expand beyond its traditional range, BIOAFTOGEN® SAT1 has become a trusted solution for emergency vaccination programs, supporting governments and veterinary authorities in protecting livestock and strengthening disease control worldwide.

Backed by the BIOAFTOGEN® PLATFORM, BIOAFTOGEN® SAT1 combines proven efficacy, world-class manufacturing, and rapid emergency response capability to support global Foot-and-Mouth Disease control and eradication.



+20

MILLION DOSES

BIOAFTOGEN® SAT1
provided



+10

COUNTRIES

across Africa, the
Middle East, and Asia

TRUSTED FOR LARGE-SCALE EMERGENCY RESPONSE IN SOUTH AFRICA



Biogénesis Bagó was selected by South Africa to support its national FMD emergency response, by providing **6 million doses of BIOAFTOGEN® SAT1** to help protect livestock through one of the largest emergency vaccination campaigns in the country's history.

VIETNAM ENHANCES READINESS AGAINST SAT1

Vietnam is reinforcing its preparedness against SAT1 through enhanced biosecurity and emergency planning. Biogénesis Bagó stands ready to rapidly supply vaccines BIOAFTOGEN® SAT1 to Vietnam to help protect the country's 31.4 million pigs and 6.14 million cattle in the event of an outbreak.



A PROVEN GLOBAL PARTNER IN FMD EMERGENCY RESPONSE

For more than two decades, Biogénesis Bagó has supported governments and veterinary authorities in responding to Foot-and-Mouth Disease emergencies across the world. From rapid vaccine deployment during outbreaks to long-term disease control and eradication programs, our experience has been built through real-world challenges on multiple continents.

Today, BIOAFTOGEN® vaccines are licensed in 30+ countries, with a manufacturing capacity of 350 million doses per year and more than 3.4 billion doses supplied globally over the past 30 years. This proven track record reflects our commitment to ensuring reliable vaccine availability whenever and wherever it is needed.

KEY MILESTONES

- **20+ years** of proven emergency response experience
- **18 emergency vaccination campaigns** across Asia, Africa, the Middle East, and South America
- **3.4+ billion doses** supplied worldwide
- **350 million doses/year** manufacturing capacity
- **Licensed in 30+ countries**, including the first FMD vaccine to achieve EuFMD Pre-Qualification

From emergency response to long-term eradication, Biogénesis Bagó continues to set the global benchmark in Foot-and-Mouth Disease prevention and control.

You are receiving this seasonal newsletter from Biogénesis Bagó Asia as part of our commitment to sharing valuable insights with our partners and customers. To subscribe or unsubscribe from this newsletter, please contact us at:

✉ Info.Asia@biogenesisbago.com

Follow us at:    

