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Prepared By: Ricardo Dias

Approved By: Rachel Vanderberg

Report Highlights:

FAS Luanda forecasts Angola's chicken meat production to increase to 80,000 metric tons (MT) in 2027, supported by continued commercial investment, although structural constraints will continue to limit domestic output. Chicken meat consumption is forecast to reach 350,000 MT, driven by population growth and poultry's affordability relative to other animal proteins. Imports are forecast to increase modestly to 270,000 MT and will continue to supply approximately 77 percent of domestic demand, underscoring Angola's continued dependence on imported poultry.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

EXECUTIVE SUMMARY

- **Production:** FAS Luanda forecasts Angola's chicken meat production at 80,000 metric tons (MT) in 2027, up from an estimated 75,000 MT in 2026. Production is expected to continue expanding as investment in commercial poultry farming, hatcheries, and processing facilities gradually increases, supported by government efforts to strengthen domestic food production and reduce reliance on imports. However, growth will continue to be constrained by high feed costs, dependence on imported breeding stock and veterinary inputs, limited access to affordable financing, and inadequate cold-chain and transportation infrastructure. As a result, domestic production is expected to supply only about 23 percent of total chicken meat consumption in 2027.

- **Consumption:** Chicken meat consumption is forecast to increase to 350,000 MT in 2027, compared to the 340,000 MT estimate for 2026, supported by population growth, urbanization, and poultry's continued affordability relative to other animal proteins. Angola's macroeconomic environment has improved, with inflation declining and the official exchange rate remaining stable since January 2025, helping to improve market conditions and consumer confidence. Nevertheless, food prices remain elevated, and household purchasing power continues to limit stronger growth in demand. Poultry is expected to remain the preferred source of animal protein for many consumers because it is more affordable than beef and other meats.

- **Imports:** Chicken meat imports are forecast to increase modestly to 270,000 MT in 2027, supplying approximately 77 percent of domestic consumption. Despite continued support for domestic production, Angola will remain structurally dependent on imported poultry. Brazil and the United States are expected to remain the country's leading suppliers, while China, Turkey, and Argentina expand their presence from a relatively small base. New legislation, Presidential Decree 130/26, requires importers of selected food products to purchase at least 20 percent of their products from local producers. The policy pushes Angola's import substitution goals but is not expected to significantly reduce poultry imports during the forecast period. Issuance of import licenses continues to present an impediment to trade for some cuts.

Chicken Meat Production, Supply, and Distribution

Meat, Chicken Market Begin Year Angola	2025		2026		2027	
	January 2025		January 2026		January 2027	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks	0	0	0	0		0
Production	63	63	75	75		80
Total Imports	250	250	265	265		270
Total Supply	313	313	340	340		350
Total Exports	0	0	0	0		0
Human Consumption	313	313	340	340		350
Other Use, Losses	0	0	0	0		0
Total Domestic Consumption	313	313	340	340		350
Total Use	313	313	340	340		350
Ending Stocks	0	0	0	0		0
Total Distribution	313	313	340	340		350
(1000 MT)						

Note: All data in 1,000 MT

PRODUCTION

FAS Luanda forecasts Angola's chicken meat production at 80,000 metric tons (MT) in 2027, a 6.7 percent increase over the 2026 estimate of 75,000 MT. Growth is expected to be driven by continued private investment in commercial poultry operations and government initiatives aimed at expanding domestic food production and reducing dependence on imports. Nevertheless, domestic production is expected to satisfy only about 23 percent of chicken meat consumption.

Over the past several years, Angola has expanded investment across the poultry value chain. According to the Ministry of Agriculture and Forestry, public investment has established 10 poultry production units (200 poultry houses) with a combined installed capacity of approximately 1.04 million birds concentrated in the provinces Cuanza Norte, Malanje, Lunda Norte, and Moxico. These projects also include the construction of two slaughterhouses and three feed mills, with the objective of expanding domestic production capacity and supporting import substitution, although production continues to lag due to feed, financing, and operational constraints. Angola currently has seven industrial poultry slaughterhouses with a combined installed capacity of approximately 130,000 birds per day. While this infrastructure provides the foundation for future industry growth, utilization rates remain below capacity because live bird production has not expanded sufficiently to fully supply processing plants.

The sector continues to be dominated by a small number of vertically integrated commercial producers. Outside these operations, most poultry production is carried out by small and micro-scale producers. According to the Ministry of Agriculture and Forestry, large commercial operations typically house around 30,000 birds per poultry house, compared to approximately 5,000 birds for small producers and

1,000 or fewer birds for micro producers. These smaller operations primarily supply local and informal markets and generally have limited access to modern processing, cold-chain logistics, commercial distribution networks, and production financing, constraining productivity and their ability to scale operations.

Production Constraints

Despite continued investment, several structural constraints continue to limit expansion of domestic poultry production. Feed remains the industry's largest production cost, with corn and soybean meal dominating production expenses. Although domestic corn production has increased in recent years, Angola continues to rely on imported soybean meal, feed additives, veterinary products, breeding stock, and production equipment, exposing producers to exchange-rate fluctuations and international supply disruptions.

Limited access to affordable financing continues to constrain expansion, particularly for medium-sized producers seeking to modernize production systems or increase flock sizes. Infrastructure deficiencies, including unreliable electricity supply, high transportation costs, and insufficient cold-chain capacity outside major urban centers, also reduce production efficiency and increase operating costs.

Animal health management has improved in recent years, but producers continue to face challenges related to biosecurity, veterinary services, and the availability of quality day-old chicks and vaccines, particularly outside the country's main production corridors. Ministry data show that poultry diseases, including Newcastle disease, infectious coryza, fowl pox, Gumboro disease, mycotoxin-related conditions, and coccidiosis, continue to cause significant production losses, particularly among smaller producers with weaker biosecurity practices. Veterinary services and sanitary controls have improved in recent years but remain uneven across provinces.

Government Policy

The Angolan government continues to prioritize poultry production as part of its broader strategy to improve food security, create rural employment, and reduce dependence on imported food products. Presidential Decree 130/26, which entered into force in June 2026, requires importers of selected food commodities, including poultry, to procure at least 20 percent of the products they commercialize from domestic producers as a condition for obtaining import licenses (see GAIN AO2026-0002: Angola to Require Mandatory Local Procurement for Food Imports). The policy is intended to increase local production by forcing stronger commercial linkages between importers, processors, and domestic farms. Other policies restrict imports without directly referencing domestic production, but are generally considered to act in support of domestic producers.

Outlook

FAS Luanda expects domestic poultry production to continue growing along with investment across the poultry value chain. However, structural constraints, including feed costs, production inputs, financing limitations, and infrastructure challenges, will continue to limit the pace of expansion. Although slaughtering and processing capacity has increased significantly, future growth will depend on expanding domestic live bird production to improve utilization of existing processing facilities. Consequently, Angola is expected to remain heavily dependent on imported poultry products throughout the forecast period.

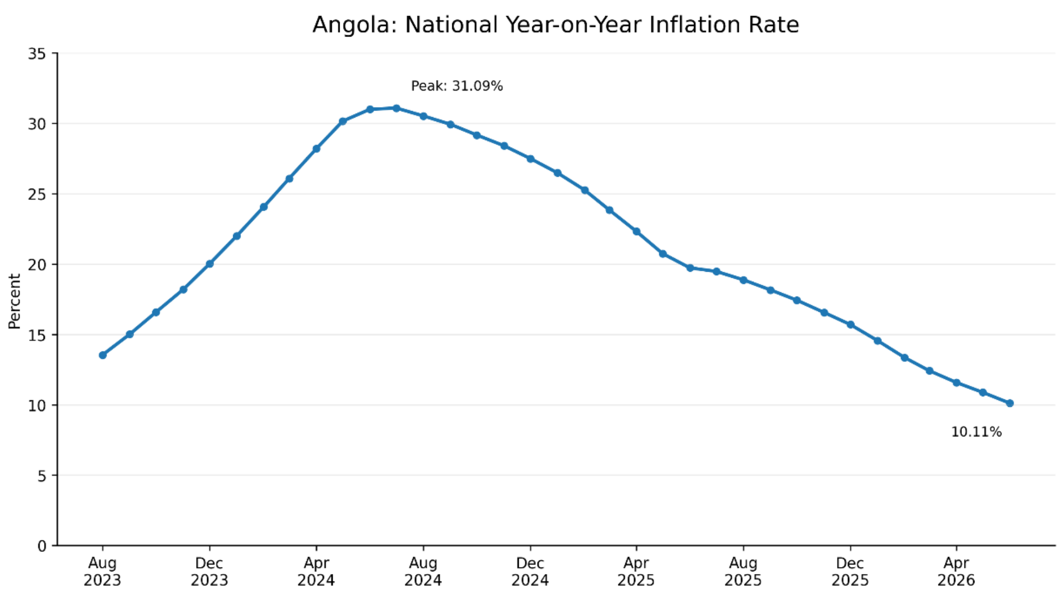
CONSUMPTION

FAS Luanda forecasts Angola's chicken meat consumption at 350,000 metric tons (MT) in 2027, an increase of approximately three percent over the 2026 estimate. Demand is expected to continue growing, supported by population growth, urbanization, and poultry's position as the country's most affordable source of animal protein. Despite continued improvements in domestic production, imported poultry products are expected to remain widely available and continue to satisfy most consumer demand.

Inflation

Inflation continues to influence consumer purchasing power and food demand in Angola. After peaking at 31 percent in mid-2024, annual inflation has declined steadily to 10.11 percent in June 2026, reflecting tighter monetary policy and improving macroeconomic conditions. Although easing inflation has reduced the pace of food price increases, household purchasing power remains constrained following several years of elevated inflation and kwanza depreciation. As a result, consumers continue to prioritize affordable sources of animal protein, with chicken remaining the preferred choice over beef, pork, and fish due to its relatively lower price and widespread availability.

Graph 1: Inflation in Angola (Percent)

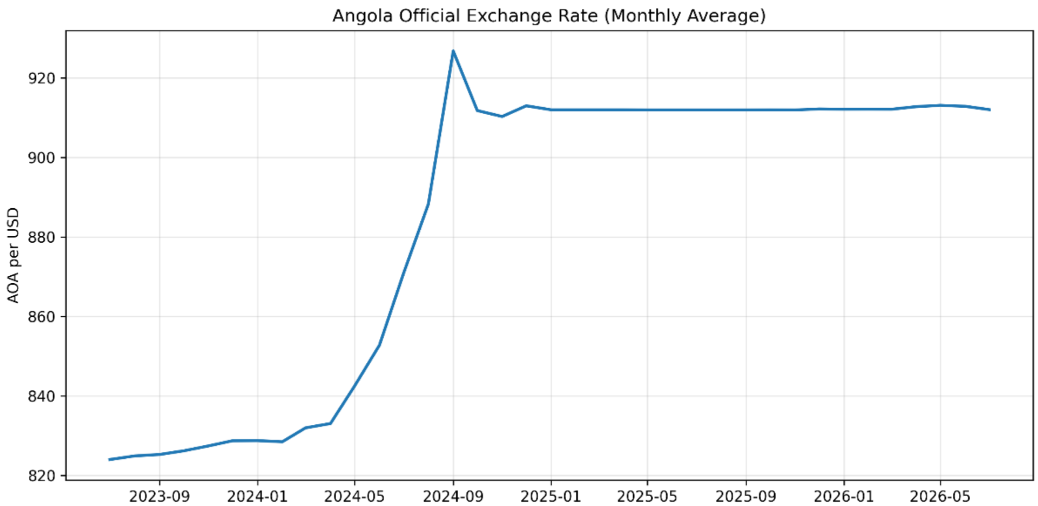


Source: National Bank of Angola

Exchange Rate

Because Angola imports the majority of its chicken meat as well as many of the inputs required for domestic poultry production, such as soybean meal, veterinary products, breeding stock, and production equipment, the exchange rate remains an important determinant of poultry prices. Following a period of significant depreciation during 2024, the official exchange rate has remained stable since early 2025, reducing uncertainty for importers and improving planning throughout the poultry supply chain. Although the kwanza remains weaker than in 2023, the recent stability has moderated additional increases in import costs and supported more predictable retail prices.

Graph 2: USD/AOA Exchange Rate



Source: National Bank of Angola

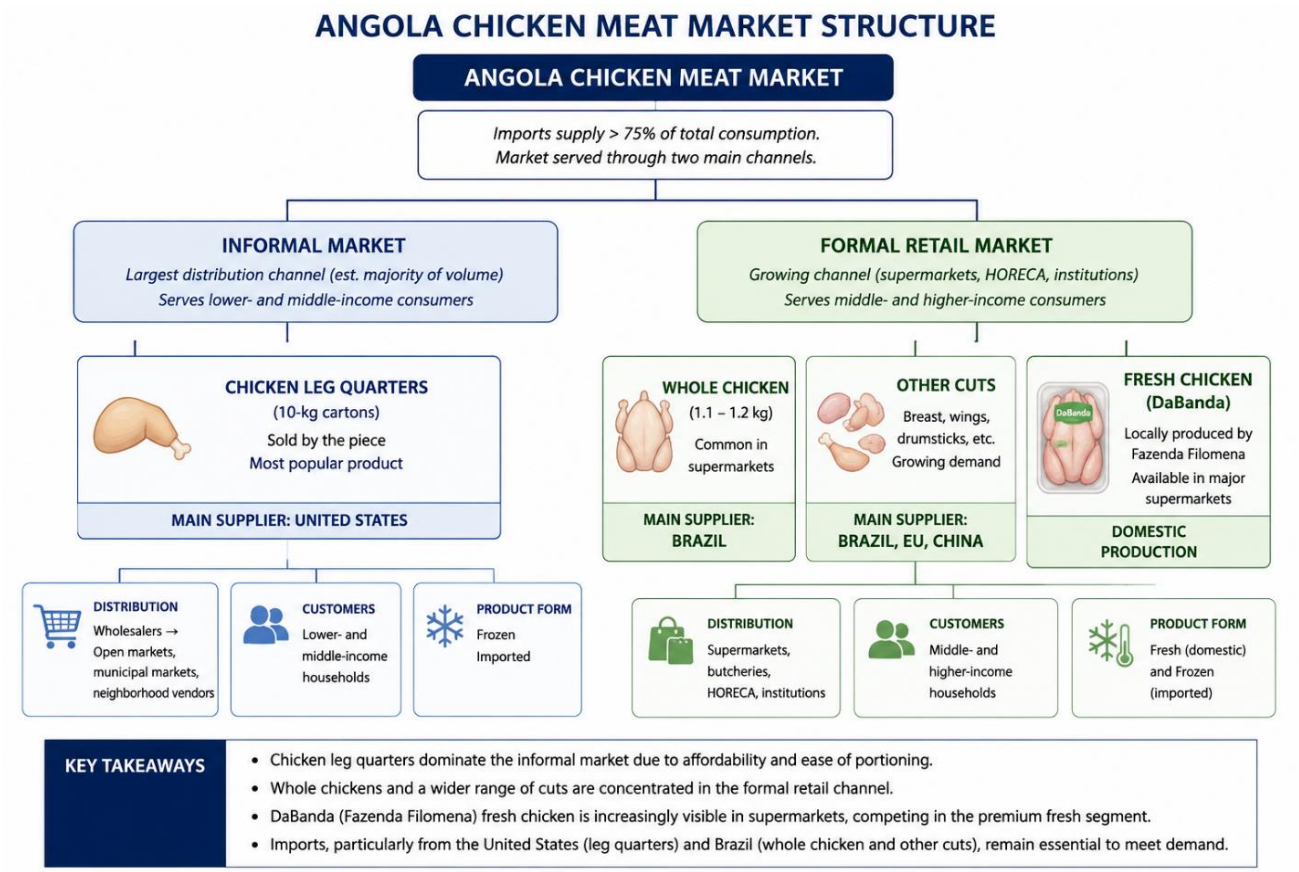
Chicken Meat Market Overview

Angola's chicken meat market continues to expand, driven by rapid population growth, urbanization, and chicken's position as the country's most affordable source of animal protein. Government initiatives to support transition from informal markets to formal retail have helped to shift the population's shopping habits somewhat. Despite continued investment in domestic production, local output remains insufficient to meet demand, and imports are expected to supply more than three quarters of total consumption through 2027.

The market is divided between a large informal sector and a growing formal retail channel. FAS contacts believe that formal businesses could now make up as much as 70 percent of the market. Some wholesalers have created retail outlets, and supermarkets like Fresmart and AngoMart cater specifically to lower- and middle-income customers. The shift from informal to formal retail channels may gradually expand the tax base, create formal employment, improve regulatory oversight and food safety, and increase transparency throughout the supply chain.

Imported frozen chicken leg quarters dominate the informal market due to their affordability and widespread availability, while supermarkets increasingly offer locally produced fresh chicken, including the DaBanda brand, produced by Fazenda Filomena. Although fresh domestic chicken is gradually gaining market share among higher-income consumers, imported frozen poultry cuts remain the preferred choice for most households because of their lower prices.

Looking ahead, domestic production is expected to continue expanding as public and private investments increase commercial production capacity. Nevertheless, high feed costs, dependence on imported production inputs, limited cold-chain infrastructure, and financing constraints will continue to limit the pace of growth. Consequently, imported frozen poultry is expected to remain the principal source of chicken meat in Angola, while locally produced fresh chicken gradually expands its presence in the formal retail market.



Source: FAS/Luanda

Consumption Outlook
FAS Luanda expects chicken meat to remain Angola's preferred animal protein during the forecast period because of its affordability and broad availability. Continued improvements in macroeconomic stability are expected to support moderate growth in consumption; however, elevated food prices and limited household purchasing power are likely to constrain stronger growth in demand.

TRADE

Imports

Angola's chicken meat imports are forecast to reach 270,000 MT in 2027, up from an estimated 265,000 MT in 2026, reflecting continued growth in consumer demand that domestic production cannot satisfy. Imports are expected to continue supplying approximately 77 percent of total consumption, despite gradual increases in domestic production.

Although the Government of Angola continues to prioritize import substitution, domestic output remains constrained by high input costs, limited access to finance, and infrastructure challenges. Consequently, imports will remain essential for ensuring adequate supplies of animal protein.

Supplier Competition

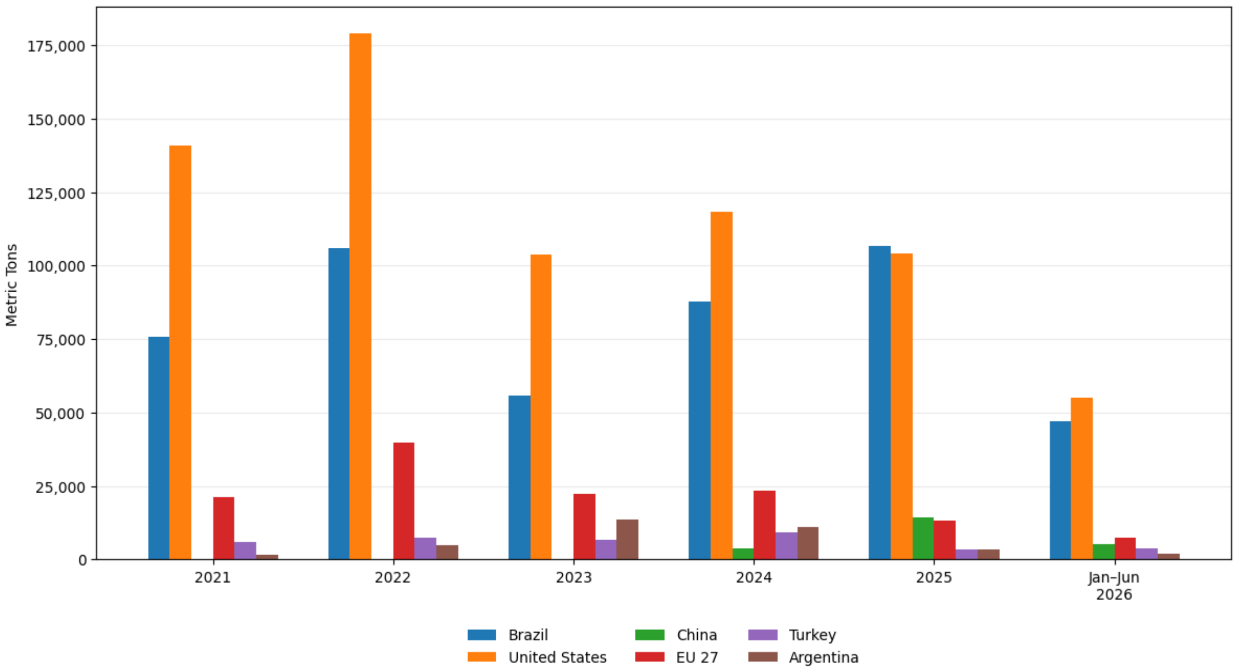
Brazil and the United States remain Angola’s dominant suppliers of chicken meat, together accounting for approximately 85 percent of total import value during January-May 2026. The United States remains the biggest supplier by value, but Brazil has recently become Angola’s largest poultry supplier by total export volume, benefiting from competitive prices and a diversified product portfolio that includes whole chickens, chicken leg quarters, mechanically deboned meat, and other cuts. The implementation of Angola’s 2024 Customs Tariff Book, which prohibited poultry offal imports, altered Brazil’s export mix and contributed to increased shipments of chicken leg quarters and other permitted products. The United States continues to dominate the chicken leg quarter segment, exporting approximately 85,600 MT in 2025 compared to 39,400 MT from Brazil, maintaining a competitive advantage through consistent product quality, reliable supply, and established commercial relationships.

China emerged as a competitor in Angola’s poultry market in 2024 with 3,653 MT of exports, which increased nearly fourfold to 14,461 MT in 2025, according to Trade Data Monitor. However, year-to-year in January to June 2026, Chinese shipments declined 5.7 percent to 5,286 MT, compared with 5,608 MT during the same period in 2025. The modest decline appears more indicative of stabilization following the sharp 2025 expansion than a reversal of China’s growing presence in the market. FAS contacts suggest that China is extremely competitive in chicken breast and is expanding offers of leg quarters, drumsticks, and whole birds, although higher freight costs and concerns regarding product quality, moisture, and texture can reduce its landed-cost advantage.

Türkiye and Argentina continue to gain ground as alternative suppliers to the Angolan market. During January-June 2026, imports from Türkiye reached 3,614 MT, up approximately 278 percent from 955 MT during the same period in 2025. Imports from Argentina also increased significantly, rising approximately 88 percent from 1,051 MT to 1,971 MT. Although both countries account for relatively small shares of Angola’s chicken meat imports compared with the United States and Brazil, the rapid year-over-year growth indicates increasing diversification of Angola’s supplier base and intensifying competition among secondary suppliers.

The European Union has continued to lose market share in Angola since its 2022 export peak. Annual exports declined from nearly 40,000 MT in 2022 to just over 13,000 MT in 2025, while shipments during January–May 2026 increased only marginally compared to the same period in 2025. As a result, the European Union now represents a relatively small supplier in Angola’s poultry import market, primarily serving niche segments rather than competing directly with Brazil or the United States.

Graph 3: Exports of Chicken Meat to Angola by Volume



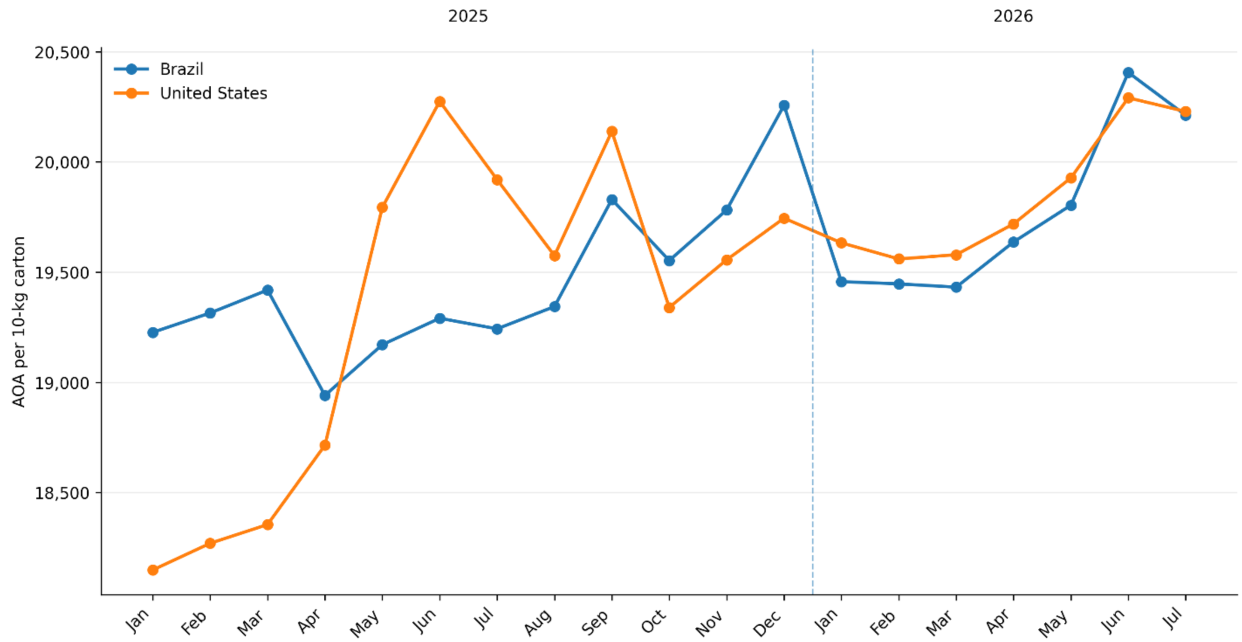
Source: Trade Data Monitor

Government Policy

In February 2025, the Ministry of Agriculture and Forestry's Institute of Veterinary Services (MINAGRIF-ISV) issued a notice announcing a phased suspension of import licenses for several animal products, including poultry offals and cuts such as wings, backs, necks, livers, thighs, and drumsticks. Although the restrictions were not implemented according to the timetable established in the notice, recent discussions with government and industry contacts indicate that MINAGRIF has begun implementation and is currently limiting poultry import licenses primarily to whole chickens and chicken leg quarters. This is beginning to reshape Angola's chicken meat import market by reducing opportunities for individual poultry cuts and concentrating import demand on the products that continue to receive licenses. For competitors to U.S. suppliers, the policy reinforces the importance of chicken leg quarters, historically the principal U.S. poultry product exported to Angola, while restricting opportunities for other cuts. This measure may also contribute to increased imports of whole chickens, while encouraging domestic processing as importers increasingly source whole birds for local cutting and distribution.

In June 2026, Angola implemented Presidential Decree No. 130/26, requiring importers of poultry, pork, rice, refined sugar, and tilapia to source at least 20 percent of their purchases from domestic producers. The measure is intended to stimulate domestic agricultural production, encourage private investment, and reduce dependence on imports. In the month since it has entered into force, effects on trade have not yet been seen. Given the significant gap between domestic production and national consumption, the policy is not expected to be meaningfully enforced during the forecast period.

Graph 4: U.S. and Brazil Wholesale Prices in Angola



Source: FAS Industry Contacts

Outlook

In spite of Angola's import substitution schemes, the market will continue to depend heavily on imported poultry products until significant improvements occur across the domestic poultry value chain. Post expects poultry imports to remain relatively stable over the forecast period as moderate improvements in domestic production will be insufficient to meet expanding consumer demand. Continued population growth, urbanization, and poultry's position as Angola's most affordable animal protein will sustain import demand.

While Brazil and the United States are expected to maintain their dominant market positions, increasing competition from Türkiye and Argentina suggests Angola's supplier base is becoming more diversified.

Exports

FAS Luanda forecasts Angola's chicken meat exports to remain negligible in 2026 and 2027, as virtually all locally produced chicken is absorbed by the domestic market. Although commercial poultry production is expanding, Angola remains a major importer of poultry products. Domestic producers continue to prioritize supplying local markets, where demand consistently exceeds local production capacity. There is little commercial incentive or production surplus available to support export activity.

Several structural constraints continue to limit Angola's export potential. Domestic producers face high production costs due to dependence on imported feed ingredients, breeding stock, veterinary inputs, and production equipment. In addition, limited processing capacity, underdeveloped cold-chain logistics, and the absence of internationally recognized export certification systems constrain the industry's ability to compete in regional or international markets. Although the government of Angola aspires to export capacity, current policies remain focused on increasing domestic production to reduce dependence on imports rather than promoting poultry exports. Given the substantial domestic supply deficit, policies are expected to continue prioritizing import substitution over export development in the near future.

Over the medium term, continued investment in commercial poultry farms, feed manufacturing, processing facilities, and animal health infrastructure could improve the sector's competitiveness. However, FAS Luanda does not expect Angola to become a meaningful poultry exporter until domestic production consistently exceeds national demand and producers are able to meet the sanitary, quality, and traceability requirements of potential export markets.

Related Reports:

2025 FAIRS Annual Country Report Annual

2026 Exporter Guide Annual

Attachments:

No Attachments