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Report Name: Poultry and Products Annual

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Report Highlights:

Post projects Calendar Year (CY)2026 Argentine poultry production at 2.58 million metric tons (MT), up 50,000 MT from updated CY2025 estimates, based on slowly growing domestic demand. CY2026 exports are projected at 150,000 MT, slightly less than downwardly-revised CY2025 estimates, based on expectations Argentina will continue navigating the closure of several overseas markets due to a Highly Pathogenic Avian Influenza (HPAI) outbreak in late August 2025. The current HPAI outbreak and ensuing trade restrictions with key markets such as China and Chile, among others, come after having just regained access to these markets in March 2025.

Executive summary

Poultry production is expected to slightly increase in CY2026, rising to 2.58 million MT. The Argentine poultry industry is primarily focused on the domestic market and much less dependent on exports than many other agricultural sectors in the country. However, as domestic consumption is growing slowly, industry anticipates exports will be an important component in any significant expansion in the Argentine poultry industry in the coming years.

On August 26, 2025, Argentina confirmed a HPAI outbreak in a commercial farm in Buenos Aires province, resulting in authorities suspending poultry exports. According to the National Service of Agrifood Health and Quality (SENASA), exports will remain suspended until Argentina regains its "disease-free" status with the World Organization for Animal Health (WOAH), which may take several weeks at a minimum. The new restrictions come at a critical time for poultry exports. In March 2025, China (a top export destination) had just reopened its market to Argentine chicken for the first time since 2023 following a similar outbreak. Now, with the reappearance of the virus, multiple key markets (including China, Chile and others) have once again suspended imports of poultry meat from Argentina.

In contrast to the export challenges experienced following the 2023 outbreak, Argentina has since established health agreements with several trading partners to formally recognize disease-free regionalization. As a result, the commercial impact of the most recent outbreak should be mitigated by the fact the country is set to continue exporting poultry (from areas outside of the affected region) with a group of markets that accounted for at least 60 percent of its trade in 2024.

Post's complete CY2025 poultry export forecast has been revised down to 156,000 MT, based on the expectation some key markets, such as China and Chile, will remain closed for the remainder of the year. CY2026 exports are projected at 150,000 MT, also grounded on the assumption some key markets will remain inaccessible for Argentine poultry for all or a portion of the year.

Production

Post estimates a modest increase in poultry meat production, rising from 2.53 million (MT) in CY2025 to 2.58 million MT in CY 2026. This increase is based on a few key factors, namely the rising price of beef and the ongoing economic recession, that continues to shift consumers to poultry as a more affordable and accessible protein source. In addition, the modest increase continues the industries growth trend of the last decade to slowly grow production volumes to meet expected future demand.

No new major expansions in processing capacity have been announced since President Milei's administration took office in December 2023. Industry reports that, despite the improvement in some economic variables and policies, expensive credit make it difficult to plan any investment. However, existing slaughter capacity is sufficient to allow for up to a 10 percent increase in production, if warranted.

The Argentine poultry sector has different processing paradigms for the domestic and export markets. Chickens destined for domestic consumption are processed over a period of 49-52 days, resulting in a carcass weight of 6-6.5 pounds. In contrast, chickens destined for export are processed over a shorter period of 28-32 days, resulting in a carcass weight of 2-2.5 pounds. The vast majority of the industry is focused on production for the domestic market.

Consumption

Post forecasts CY2026 domestic consumption at 2.46 million MT, setting per capita consumption at 51 kg (119 pounds). Domestic consumption has historically accounted for approximately 90 percent of chicken production with consumption growth driven mainly by population growth. In recent years, the cost of chicken has risen more slowly than beef, encouraging a switch in protein sources in a price sensitive market. In addition to economic reasons, market contacts report chicken has a public perception as being healthier than beef.

Whole broilers represent 70 percent of domestic chicken meat consumption. Industry contacts report that further processed value added products, such as precooked meals, frozen chicken meals, chicken nuggets, and ground chicken patties represent market sector growth opportunities.

Post's complete CY2025 domestic consumption forecast has been revised up roughly 30 MT to 2.39 million MT, based on updated market data.

Trade

Exports

Post estimates Argentina's CY2026 exports at 150,000 MT, slightly down from Post's downwardly revised export forecast for CY2025 of 156,000 MT. The estimate for CY2026 is grounded on the assumption that multiple key markets currently closed to due to avian influenza will remain inaccessible for Argentine poultry exports in 2026.

On August 26, 2025, Argentina confirmed a HPAI outbreak in a commercial farm in Buenos Aires province, resulting in authorities suspending poultry exports. According to SENASA, exports will remain suspended until Argentina regains its "disease-free" status with the WOA, which may take several weeks or months.

To resume poultry meat exports, Argentina must demonstrate that at least 28 days have passed without new outbreaks and that the tasks of eliminating the source, cleaning, disinfecting, and epidemiological control have been carried out, as established by international regulations.

The new restrictions come at a critical time for poultry exports. In March 2025, China (a top export destination) had just reopened its market to Argentine chicken after having kept it closed since 2023 for a similar outbreak. Now, with the reappearance of the virus, multiple key markets (including China, Chile and others) have once again suspended imports of poultry meat from Argentina.

In contrast to the export challenges experienced following the 2023 outbreak, Argentina has since established health agreements with several trading partners to formally recognize disease-free regionalization. As a result, the commercial impact of the most recent outbreak should be mitigated by the fact the country is set to continue exporting poultry (from areas outside of the affected region) with a group of markets that accounted for at least 60 percent of its trade in 2024.

Post's revised CY2025 estimate of 156,000 MT is based expectations that Argentina will continue trading with countries they have a regionalization agreement with and on export data from January to August, when the China and Chile markets (Argentina's most important) were both briefly open.

Imports

Post estimates imports for CY2026 at 30,000 MT, mostly chicken cuts from Brazil. As members of MERCOSUR, chicken meat products are not subject to import tariffs from other members and enter Argentina tariff-free, while other exporters face external MERCOSUR tariffs of 10 to 16 percent. Post adjusted imports for CY2025 slightly higher at 25,000 MT, reflecting trade data indicating price-driven imports from Brazil with products ranging from fresh and chilled to frozen and precooked products.

Policy

Argentina entered 2025 with a sense of cautious optimism. After years of crisis and high levels of inflation, the macroeconomy shows some signs of stabilization and recovery. Despite these favorable developments, Argentine consumers continue to experience the effects of the recession.

One of the most visible changes came from the exchange rate system. In April 2025 the government lifted most currency and capital controls but not all of them, moving the peso to a managed float within wider trading bands. This reform ended the multiple-exchange-rate system and unified the market, although the Treasury and Central Bank still intervene occasionally to reduce sharp volatility. As of publication, the peso trades around 1,400 ARS per U.S. dollar, a rate seen as relatively stable compared to the sharp depreciations of previous years.

The fight against inflation also shows results. Monthly price increases fell below 2 percent for the first time in five years, with inflation in May and June at only 1.5 – 2 percent. While annual inflation is still expected to close between 23 and 30 percent, this is a dramatic improvement from rates above 200 percent in 2024. Inflation control, however, comes at a cost: interest rates remain extremely high making credit expensive and limiting private investment as well economic activity.

Export taxes continue to be a key economic tool for the government and a thorn for the industry. After years of cries from the industry and promises by the current administration to lower export taxes, in July 2025 the government permanently lowered export taxes. Taxes on poultry exports were cut from 6.5 to 5 percent. Wheat, corn, sorghum, and barley are now taxed at 9.5 percent. While the soybean rate, one of the largest revenue sources for the government was reduced from 33 to 26 percent.

The reduction of export taxes on poultry meat provides some welcome relief, especially in an operating environment where logistics, energy, and financial costs remain high. Furthermore, this would enhance the competitiveness of Argentine chicken in markets such as China, Chile, the United Arab Emirates, and South Africa once the markets reopen where the industry sees its growth potential.

However, the poultry industry has asserted that maintaining the export tax and only lowering it by 1.5 percent is not sufficient and hinders the Argentine poultry industry from further growth. They argue that in order to thrive in a competitive global market, it is essential for businesses to have macroeconomic stability, clear rules of the game, access to credit, and a gradual but definitive elimination of distortive

taxes. Only then will the Argentine poultry industry be able to expand its production capacity and reach its export potential.

Statistical Tables

Meat, Chicken Market Year Begins Argentina	2024		2025		2026	
	Jan 2024		Jan 2025		Jan 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	2485	2485	2545	2525	0	2575
Total Imports (1000 MT)	7	7	7	25	0	30
Total Supply (1000 MT)	2492	2492	2552	2550	0	2605
Total Exports (1000 MT)	175	175	195	156	0	150
Human Consumption (1000 MT)	2317	2317	2357	2394	0	2455
Other Use, Losses (1000 MT)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT)	2317	2317	2357	2394	0	2455
Total Use (1000 MT)	2492	2492	2552	2550	0	2605
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	2492	2492	2552	2550	0	2605
(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments