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Report Highlights:

Post forecasts Calendar Year 2027 (CY) Argentine chicken meat production at 2.59 million metric tons (MMT). CY2027 exports are forecast at 125,000 MT as markets affected by the 2026 Highly Pathogenic Avian Influenza (HPAI) outbreaks reopen gradually. China, traditionally one of Argentina's top poultry export markets, remains closed. Imports are forecast at 50,000 MT, driven by increased purchases of mechanically separated meat (MSM) from Brazil to make up for lower domestic supplies.

Executive Summary

Post forecasts CY2027 chicken meat production at 2.59 MMT, up only slightly from Post's 2026 estimate. Firm domestic demand is expected to support production. Strong domestic demand is expected to support production. However, with per capita consumption already near record levels and export opportunities still limited, there is little room for significant further growth.

Post estimates CY2026 chicken meat production at 2.57 MMT, two percent above CY2025. Highly Pathogenic Avian Influenza (HPAI) outbreaks and the temporary closure of several export markets reduced external demand, but firm domestic demand and favorable poultry prices provided an outlet for production and supported modest year-over-year growth.

Post forecasts chicken meat exports at 125,000 MT in both CY2026 and CY2027. Export markets affected by the 2026 HPAI outbreaks are gradually reopening, but China remains closed to Argentine poultry. At the same time, rising Chinese poultry exports are increasing competition for Argentine products in other price-sensitive markets.

Imports are forecast at 50,000 MT, significantly above the CY2026 USDA official figure. Demand for mechanically separated meat is expected to remain steady. Lower production by the largest poultry producer and processor is being offset by increased imports from Brazil, although imports will still account for only about two percent of total consumption.

The main uncertainty for CY2027 is how quickly Argentina can reopen lost export markets and expand access to new ones. If market access improves, exports could exceed the current forecast of 125,000 MT. A reopening of China would help, particularly for products with little domestic demand, but weaker Chinese import demand means shipments are unlikely to quickly return to previous levels.
Other risks to the outlook include new animal disease outbreaks, changes in feed and processing costs, exchange rate movements, and growing competition in price-sensitive export markets. However, strong domestic demand and chicken's competitive price compared with other animal proteins should continue to provide a stable base for industry.

Meat, Chicken	2025		2026		2027	
Market Year Begins	Jan 2025		Jan 2026		Jan 2027	
Argentina	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)	2525	2525	2590	2575	0	2590
Total Imports (1000 MT)	25	25	20	50	0	50
Total Supply (1000 MT)	2550	2550	2610	2625	0	2640
Total Exports (1000 MT)	153	153	125	125	0	125
Human Consumption (1000 MT)	2397	2397	2485	2500	0	2515
Other Use, Losses (1000 MT)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT)	2397	2397	2485	2500	0	2515
Total Use (1000 MT)	2550	2550	2610	2625	0	2640
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	2550	2550	2610	2625	0	2640
Not official USDA DATA	OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query					

Production

Post forecasts CY2027 chicken meat production at 2.59 MMT, up only slightly from Post's 2026 estimate. Firm domestic demand is expected to support production Strong domestic demand should continue to support production, but further growth is likely to be modest. Per capita chicken consumption is already near record levels, while export opportunities remain limited.
Post estimates CY2026 chicken meat production at 2.57 MMT, two percent above CY2025.

Highly Pathogenic Avian Influenza (HPAI) outbreaks and the temporary closure of several export markets reduced external demand, but firm domestic demand and favorable poultry prices provided an outlet for production and supported modest year-over-year growth.
Average wholesale broiler prices during January through June 2026 were approximately 2,913.7 Argentine pesos (ARS) per kilogram (almost $2 USD), an increase of 31 percent from the same period in 2025. These prices helped sustain industry returns and supported continued production even as access to several foreign markets was suspended. Chicken also maintained its price advantage over beef, sustaining higher levels of domestic consumption supporting sales in the domestic market.

The largest poultry producer and exporter continues to face financial and operational difficulties affecting production, processing, and exports. The company historically accounted for approximately 35 percent of Argentine poultry exports, but its share has fallen to an estimated 20 percent following lower production, financial constraints, and disruptions in key export markets. Other processors have absorbed some growers and production previously associated with it, somehow limiting the effect on total nationwide production. Replacing the company's export capacity is more difficult due to its extensive established customers and specialized product mix it created to serve those customers. The company's difficulties are therefore expected to have more of an impact on exports than Argentina's total production and slow the overall recovery of the industry in CY2027.

Consumption

Post forecasts CY2027 domestic chicken meat consumption at 2.51 MMT, up slightly from the revised CY2026 Post estimate. While per capita consumption remains around 51 kilograms, population growth is expected to support the growth in consumption.

Argentine consumers continue to face limited purchasing power and tight household food budgets, driving demand for lower cost animal protein. Poultry remains the most affordable meat and is increasingly selected in place of beef and other higher priced proteins. Weak export demand is expected to leave more product for the domestic market. However, with domestic consumption already high on a per capita basis, this leaves little room for additional growth.

Post estimates CY2026 domestic chicken meat consumption at 2.5 MMT, approximately four percent above CY2025. Lower exports left more chicken meat available for the domestic market. Strong domestic demand helped absorb the additional supply, supported by chicken's price advantage over other animal proteins. This was particularly important when sanitary restrictions limited export opportunities.

Trade

Exports

Post forecasts CY2027 chicken meat exports at 125,000 MT, unchanged from CY2026. Assuming no new HPAI outbreaks, continued access to reopened markets should support increased shipments, but USDA export forecasts are made with the assumption of policy in place. However, China remains closed to Argentine exports, opportunities in the European Union are limited, and competition is growing in other price-sensitive markets. As a result, rebuilding lost markets and finding new export destinations will take time.

Structural changes in China's poultry sector may further limit Argentina's longer-term export opportunities. USDA forecasts China's chicken meat production at 17.3 MMT in 2026, up five percent from 2025. Imports are forecast to decline 16 percent to 250,000 MT, while exports increase 29 percent to 1.4 MMT. China became a net chicken meat exporter in 2024/25, and its share of global exports is forecast to reach approximately nine percent in 2026, compared with six percent in 2024.

China's export growth is supported by expanding integrated production, increased processing capacity, relatively low feed costs, and government support. Production is growing faster than domestic consumption, increasing exportable supplies. China has also expanded beyond its traditional processed poultry markets in Japan and Hong Kong, with frozen cuts increasingly shipped to price sensitive destinations in Russia, Central Asia, Southeast Asia, the Middle East, and Africa.

Argentina’s poultry export outlook is likely to remain challenging even if China restores market access. Rising Chinese production and lower import demand will make it difficult for Argentine shipments to return to previous levels, although niche products such as chicken paws and edible offal could still find opportunities. At the same time, stronger Chinese competition in other price-sensitive markets could make it harder for Argentine exporters to expand sales elsewhere, while China itself is expected to become a less important market for Argentine poultry.

Post therefore forecasts no growth in Argentine exports in 2027 compared with 2026. The pace of any subsequent recovery will depend not only on restored sanitary access but also on Argentina's ability to develop markets where its product mix, prices, and market access allow it to compete effectively.

Post estimates 2026 chicken meat exports at 125,000 MT, approximately 18 percent below the 2025. Trade Data Monitor data show exports of 60,557 MT during January through June, down 28 percent from the same period in 2025. HPAI outbreaks and the resulting market suspensions reduced shipments in the first half of the year. Post expects a modest improvement during the second half as reopened destinations resume purchases, but China remains closed.

Argentina recovered its HPAI free status on April 27, 2026, when SENASA closed the final commercial poultry event and submitted its self-declaration to the World Organization for Animal Health. Market access subsequently improved on a destination by destination basis. The United Kingdom assigned April 29 as the effective reopening date, Chile and Peru reopened in June, and the European Union authorized imports to resume beginning August 17. These reopenings are expected to support shipments in the last half of the year.

Argentine regulations allow exporters to obscure the data and report export destinations as “Confidential” which skews the data. According to Argentine Customs, approximately 46 percent of shipments so far this year were reported as confidential. Chile and Peru, which reopened in June, have traditionally been important regional markets because of their proximity, established commercial relationships, and demand for Argentine poultry. Shipments to these markets are expected to resume gradually during the second half of this year. The United Kingdom may also gain some market share following restored access. Saudi Arabia remains a potential market for Argentine poultry as exporters look for alternatives to traditional destinations, diversification strategy, although no shipments were reported January through June.

The reopening of the European Union gives Argentine poultry exporters renewed access to a high-value market, but export volumes are likely to remain limited in the near term. Brazil already holds much of the EU’s preferential poultry access through country-specific quotas and has a well-established presence in the market. Additional duty-free access for Mercosur poultry will also be introduced gradually rather than becoming available all at once.

Post’s contacts estimate Brazil could capture approximately 84 percent of the quota while Argentina could get up to 15 percent. Access from August 17 therefore improves Argentina’s market and product value diversification but is not expected to generate a large increase in 2026 shipments.

Imports

Post forecasts CY2027 chicken meat imports at 50,000 MT, the same as Post’s 2026 estimate, but 150 percent above the CY2026 USDA official figure of 20,000 MT. Despite the large percentage increase, imports would account for only approximately two percent of domestic consumption. Brazil is expected to remain the dominant supplier because of its scale, proximity, product availability, and preferential market access under MERCOSUR. Demand for mechanically separated chicken meat (MSM), used by food manufacturers and foodservice suppliers, is expected to remain broadly stable. However, reduced domestic MSM production by the large processor currently experiencing financial difficulties has limited domestic availability, encouraging additional purchases from Brazil.

Post estimates CY2026 chicken meat imports at 50,000 MT, double the CY2025 USDA official figure of 25,000 MT. Imports will still account for only a small share of total supply, with most of the increase coming from MSM brought in to make up for lower domestic supplies of this product.

Brazil is by far Argentina's principal foreign supplier. According to Argentine Customs data for January through March 2026, Brazil supplied more than 99 percent of poultry imports by volume, principally frozen chicken cuts, edible offal, and MSM, with smaller volumes of frozen whole chickens. Brazil remains a highly competitive supplier to Argentina. Its large export industry can offer a wide range of poultry products at scale, while its proximity helps keep transportation costs low. Brazilian poultry also enters duty-free under MERCOSUR, giving exporters an additional price advantage. Products meeting origin requirements may enter Argentina duty free, while suppliers outside the bloc generally face the MERCOSUR common external tariff.

Policy

Sanitary policy and market access remain key issues for Argentina's poultry sector. The government continues to seek recognition of regionalization by trading partners, which would allow exports from unaffected areas to continue if an isolated HPAI outbreak occurs and does not automatically suspend poultry exports from the entire country. The disruptions in 2025 and 2026 showed why this is important. Countries that recognize regionalization can limit restrictions to the affected area, while others may suspend imports of fresh poultry from all of Argentina until the country regains disease-free status.

The government also continues to take steps to lower costs and improve the competitiveness of agricultural exports. In July 2025, it permanently reduced export duties on poultry products from 6.5 percent to 5 percent, providing some relief to exporters. However, Post contacts continue to report that Argentina’s high overall tax burden, expensive financing, logistics and energy costs, and exchange rate conditions continue to discourage investment and make it harder to compete in export markets.

Attachments:

No Attachments