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Report Highlights:

Brazil is the third-largest chicken meat producer in the world after the United States and the largest chicken meat exporter in the world. Post forecasts chicken meat production will increase 3 percent in 2026 due to consistent external demand, a lower currency valuation, sluggish socio-economic performance, lower production costs, and increased domestic consumption. Brazil is currently free from Highly Pathogenic Avian Influenza (HPAI) in commercial plants. This report uses the current disease status for its estimates. Post estimates domestic consumption to increase 3 percent in 2026. Chicken meat exports are forecast to increase 2 percent in 2026, as Brazil opens new markets and consolidates and diversifies exports to existing markets. Brazil is focused on negotiating regionalization clauses to its current health certificates, with the objective of protecting its exports in case of additional HPAI or Newcastle Disease outbreaks.

EXECUTIVE SUMMARY

Production

Brazil is the third-largest chicken meat producer in the world after the United States and the People's Republic of China (PRC). Chicken meat production in 2026 is forecast at 15.8 million metric tons (MMT), a 3 percent increase from the 2025 estimate. This is a record high for Brazil and the estimate is based on consistent external demand, sluggish socio-economic performance, and improved domestic consumption. Brazil's commercial plants are currently free from Highly Pathogenic Avian Influenza (HPAI), and this is reflected in this report.

Consumption

Post forecasts domestic chicken consumption in 2026 at 10.7 MMT, a 3 percent increase from the 2025 estimate, as decreased consumption of other animal protein sources is expected. Post anticipates approximately 68 percent of Brazilian chicken production will be consumed domestically in 2026.

Trade

Brazil is expected to remain the world's largest exporter of chicken meat in 2026 and is forecast to export 5.1 MMT, an increase of 2 percent. These values do not include chicken paws. The government of Brazil is working to open new markets, increase product diversity in existing markets, and negotiate regionalization clauses to its current health certificates to avoid market closure in case of new Highly Pathogenic Avian Influenza (HPAI) and Newcastle Disease cases in commercial operations. Brazil continues to focus on halal markets for exports. Post forecasts chicken meat imports at 5,000 MT in 2026, coming from Argentina and Chile.

Figure 1

| <i>Chicken Meat Production, Supply, and Distribution Meat, Chicken</i> Market Year Begins Brazil | 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) | 15000 | 15000 | 15250 | 15350 | 0 | 15800 |
| Total Imports (1000 MT) | 5 | 5 | 5 | 5 | 0 | 5 |
| Total Supply (1000 MT) | 15005 | 15005 | 15255 | 15355 | 0 | 15805 |
| Total Exports (1000 MT) | 4894 | 4996 | 5090 | 5000 | 0 | 5100 |
| Human Consumption (1000 MT) | 10111 | 10009 | 10165 | 10355 | 0 | 10705 |
| Other Use, Losses (1000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Dom. Consumption (1000 MT) | 10111 | 10009 | 10165 | 10355 | 0 | 10705 |
| Total Use (1000 MT) | 15005 | 15005 | 15255 | 15355 | 0 | 15805 |
| Ending Stocks (1000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Distribution (1000 MT) | 15005 | 15005 | 15255 | 15355 | 0 | 15805 |
| | | | | | | |
| (1000 MT) | | | | | | |
| OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query | | | | | | |

Source: Not Official USDA Data

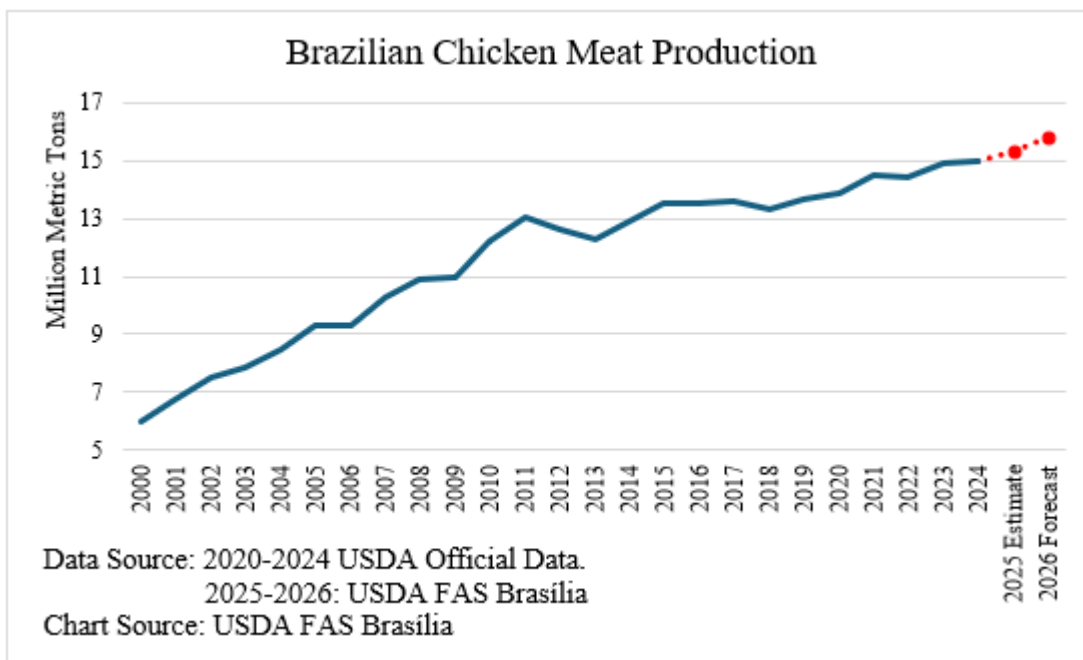
POULTRY

1. Production

Brazil is the third-largest chicken meat producer in the world, behind the United States, and was recently surpassed by the PRC, per official USDA data. Post forecasts chicken meat production in 2026 to increase 3 percent from an estimated 2 percent increase in 2025, reaching 15.8 million metric tons (MMT) in the outyear. Post’s forecast is based on consistent external demand, a lower currency valuation, sluggish socio-economic performance expected for the country, production costs, and increased domestic consumption. Post forecasts that production in 2026 will reach record levels, as presented in Figure 2.

Figure 2

Brazilian Chicken Meat Production, 2000-2024, 2025 Estimate and 2026 Forecast

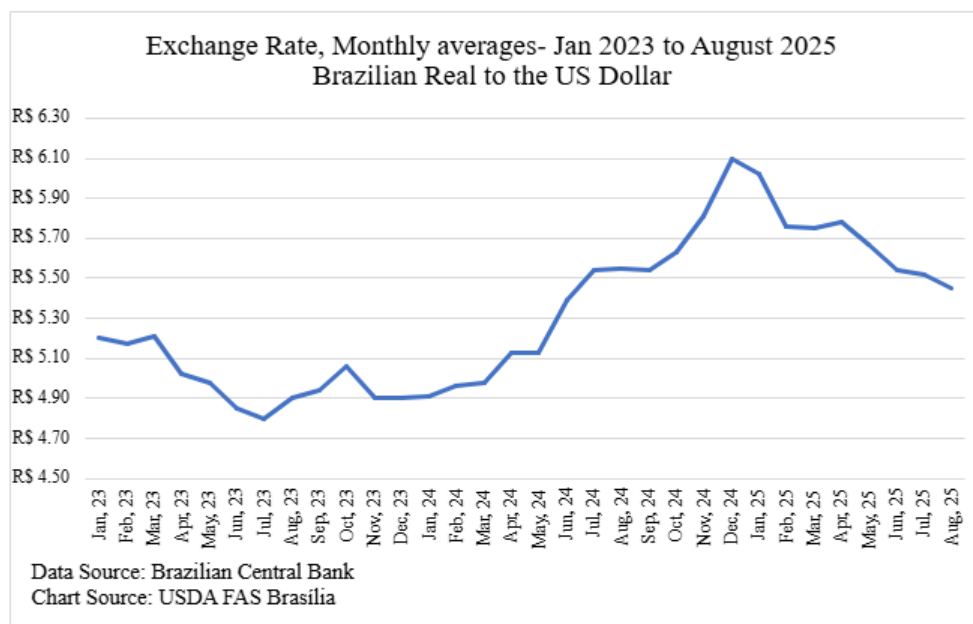


1.1. Socio-Economic Factors to Weigh on Production

The Brazilian Central Bank (BCB) forecasts GDP to grow 1.80 percent in 2026, following a 2.2 percent growth in 2025. The Central Bank Focus Survey published on September 19th anticipates inflation at 4.29 percent in 2026 and 4.83 percent in 2025. The exchange rate for the Brazilian currency real to U.S. dollars is forecasted at R\$5.60 to USD1.00 in 2026 and R\$ 5.50 to every dollar in 2025. The real has continued to lose value, affecting production and exports.

Figure 3

Average Monthly Exchange Rate – January 2023 to August, 2025



The Institute of Geography and Statistics (IBGE) latest data reports that Brazil had 6.3 million unemployed people in the second quarter of 2025, representing a 5.8 percent unemployment rate. However, there are an additional 2.8 million people that have stopped looking for work. The total underutilized rate for the second quarter of 2025 is 14.4 percent.

Brazilian Tax Reform and Implications for the Agricultural Sector

On July 7th, 2023, the Brazilian Chamber of Deputies approved a major tax reform to simplify federal and state tax codes. The idea is that federal, state, and local taxes – which often overlap – will be replaced by a simplified value added tax (VAT). The government is preparing bills to fully implement the reform.

On January 16, 2025, [Complementary Law 214/2025](#), was signed into effect, implementing the Tax on Goods and Services (IBS), the Social Contribution on Goods and Services (CBS), and the Selective Tax (IS), all acronyms in Portuguese. A trial phase will begin in 2026 with test rates for the CBS and the IBS. The Complementary Law also brings tax exceptions and reductions pertinent to the agricultural sector. For more information on the tax reform, please consult the Report [BR2025-0004](#).

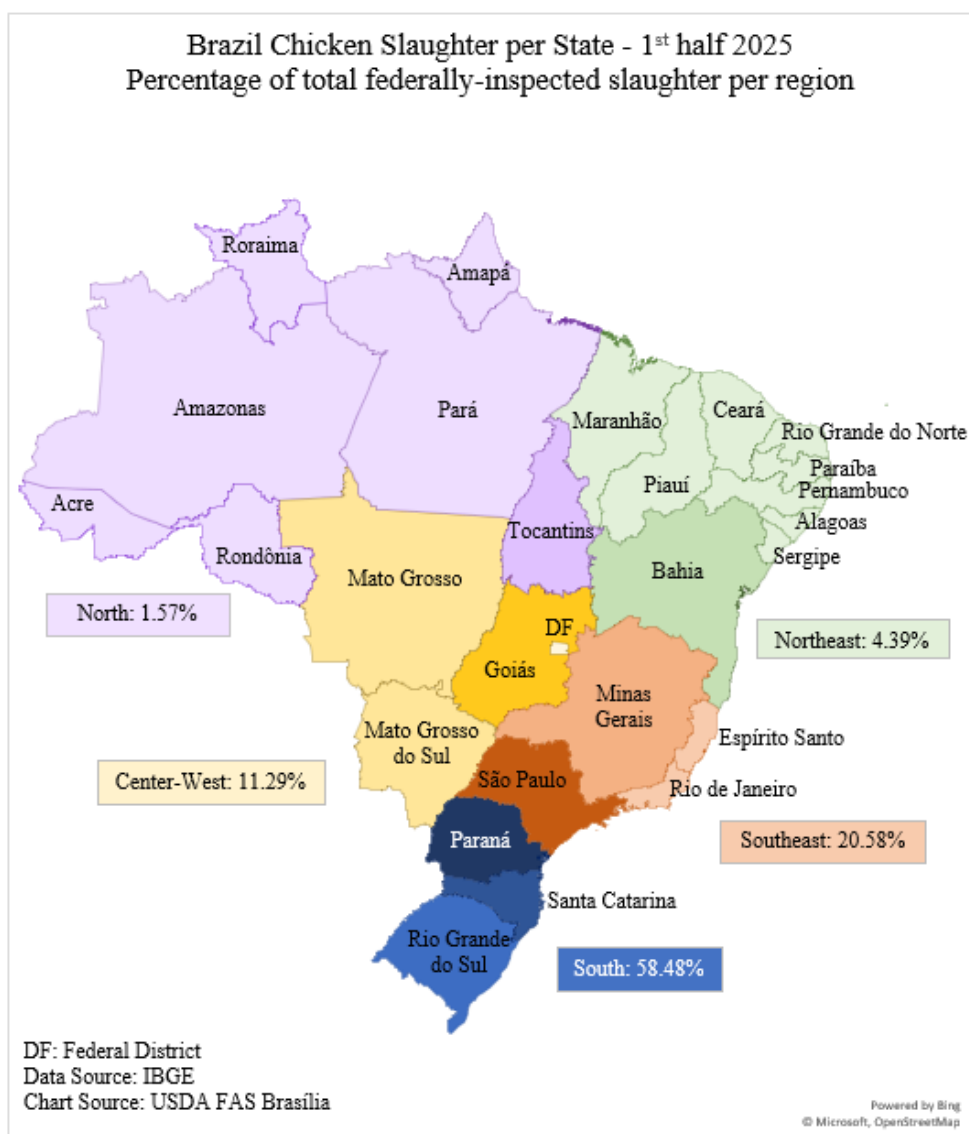
Other points, such as the high interest rate and tariffs, fiscal uncertainties, and regulatory issues, all weigh on producers' capacity to make investments, take on risks, and make decisions about production levels.

1.2. Production by States

Figure 5 shows chicken meat production across Brazil for the first half of 2025, the latest official IBGE final data available. Within the regions, the darker the color, the higher the percentage of Brazilian slaughter is in the state. The South region of Brazil – composed of the states of Paraná, Santa Catarina, and Rio Grande do Sul – continues to lead the country in chicken production, representing 58.5 percent of the national production. Paraná state is the single largest producer, responsible for 35.2 percent of total chicken meat coming out of Brazil in the first half of 2025, followed by Santa Catarina, São Paulo, Rio Grande do Sul, and Goiás states.

Figure 4

Brazilian Chicken Meat Production by State – First Half of 2025 – Percentage of Total



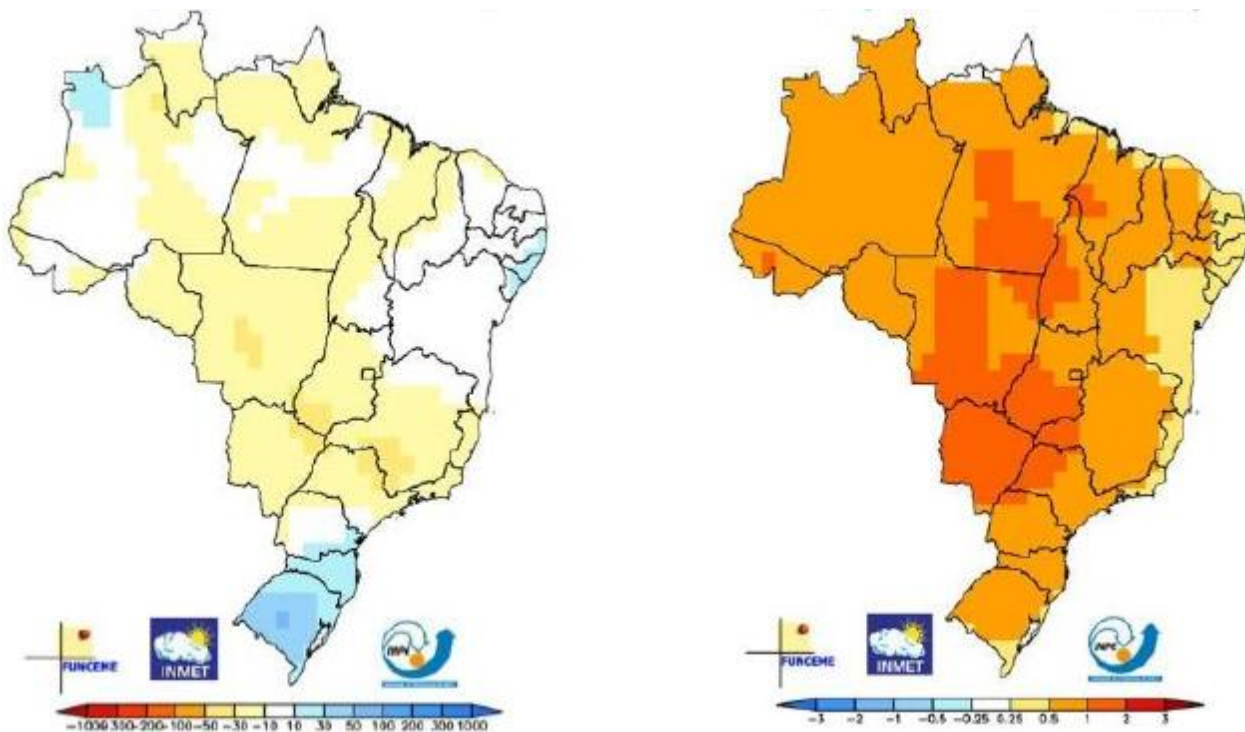
Weather Conditions

Climate is an important factor in chicken production. The ideal temperature for production varies between 18°C to 24°C (64° to 75°F). Temperatures outside of this range impact the chickens' thermal balance. Subject to higher temperatures, chickens tend to drink more water and eat less feed – gaining less weight and producing fewer eggs. Subject to lower temperatures, chickens tend to pile up, not eating or drinking enough to gain adequate weight for slaughter and becoming more susceptible to respiratory diseases. Poultry house humidity also impacts chicken comfort and production, with ideal ranges of humidity from 40 to 70 percent.

Forecasts from the National Meteorology Institute (INMET) show that in the months of August, September, and October 2025, rainfall will be above average in the states of Santa Catarina and Rio Grande do Sul, and in the south of Paraná state. In the central and northern parts of Paraná, rainfall is expected to be within or below the historical average. Temperatures are also forecasted above average for the period in the southern region of Brazil. Since these states are the largest poultry producers in Brazil, it is important to carefully monitor temperature changes due to the potential impacts mentioned above. The maps in Figure 6 show, to the left, the forecast of rainfall abnormalities in the country; and to the right, temperature abnormalities in the quarter.

Figure 5

Rainfall (L) and Temperature (R) Abnormalities Forecast – August to October, 2025.



Data Source: INMET Monthly Agri Climatological Report August 2025

The National Oceanic and Atmospheric Administration (NOAA) predicts neutral conditions for El Niño to continue through August-October 2025. Poultry producers continue to monitor weather conditions, as abrupt

climate changes can lead to increased bird deaths and increased expenditures for electricity to guarantee the thermal comfort for the birds.

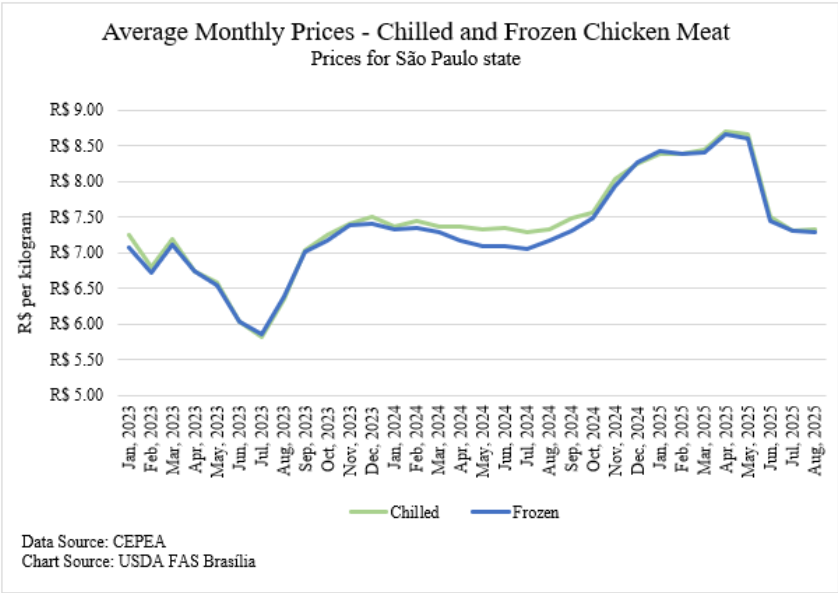
1.3. Price and Profitability Outlook

Post estimates poultry prices will start to recover in the second half of 2025 following the first outbreak of HPAI in a commercial plant in the first half of the year. More information on the outbreak in section “1.5. Sanitary Status” of this report. The forecast is based on overall decreased input costs – such as sanitary, labor, and transportation costs, domestic inflation, and external demand. The average price per kilogram of chilled chicken meat during the period of January to August, 2025 was R\$8.07 (USD1.42), and frozen chicken was sold at an average price of R\$8.05 (USD1.41). For comparison, in the same period in the previous year, the average prices for frozen and chilled chicken were 9.8 to 12 percent higher than the previous year average.

The graph in Figure 7 shows the average monthly prices for chilled and frozen chicken since January 2023. The graph demonstrates in the last quarter in 2024 and in the first quarter of 2025 a recovery in prices, a response to demand, a production adjustment to force an increase in prices paid to the producers, and shows the drop in prices due to the HPAI case in a commercial plant.

Figure 6

Average Monthly Prices – Chilled and Frozen Chicken Meat



Despite the HPAI case, producers have expanded their production levels, and up until July, chicken placement was three percent higher than from January to July, 2024. Given the short lifecycle of chickens, producers balance demand and production levels more quickly than other animal protein producers – such as cattle and swine, whose lifecycles are much longer than that of chickens.

1.4. Production Costs

1.4.1. Cost of Feed

The National Union for the Animal Feed Industry (Sindirações) forecasts close to three percent growth for 2025, for a total of 93.8 million tons of feed. For broilers, feed production in 2025 is forecast at 37.9 million tons, and for layers at 7.4 million tons, a 2.7 percent increase from the previous year in both cases.

For both broilers and layers, the top macro ingredient used for feed is corn, followed by soybean meal. The feed industry is highly dependent on the animal protein sector – especially poultry and swine production. It is important to note that sources point to idle capacity in the feed industry, meaning production could ramp up if needed.

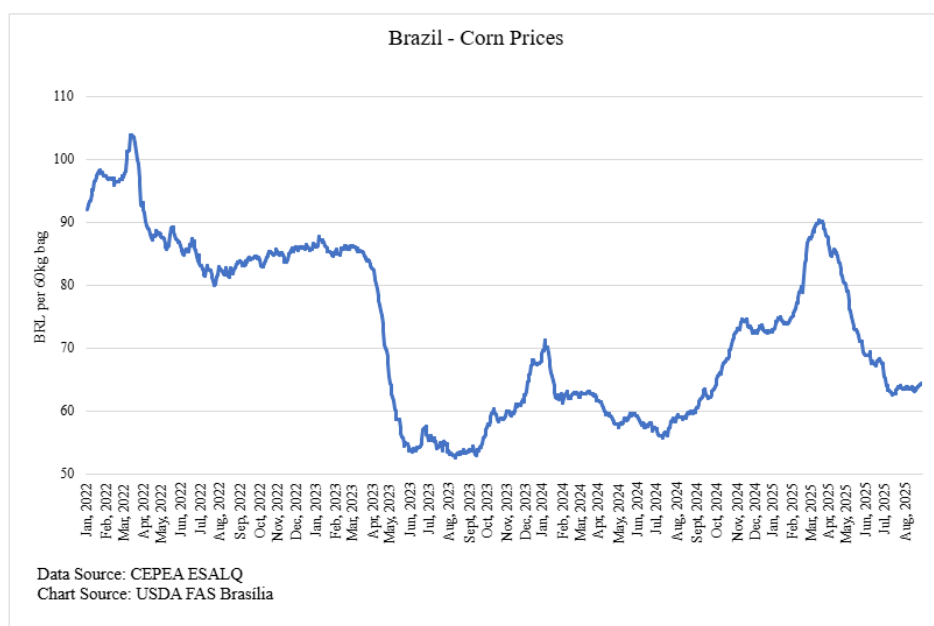
As a major producer of both corn and soybean meal, Brazil has a competitive advantage when producing animals for subsequent slaughter, decreasing the cost of feed. For crop season 2025/2026, USDA forecasts increased crops from the previous harvest.

Corn

The USDA World Agricultural Supply and Demand Estimates (WASDE) forecasts corn production for MY 2025/26, as of August 12th, at 131 MMT. Brazil is expected to remain the third-largest corn producer in the world, behind the United States and the PRC. Corn prices have improved for producers in the period of January-August, 2025, compared to the same period in 2024, as seen in Figure 8.

Figure 7

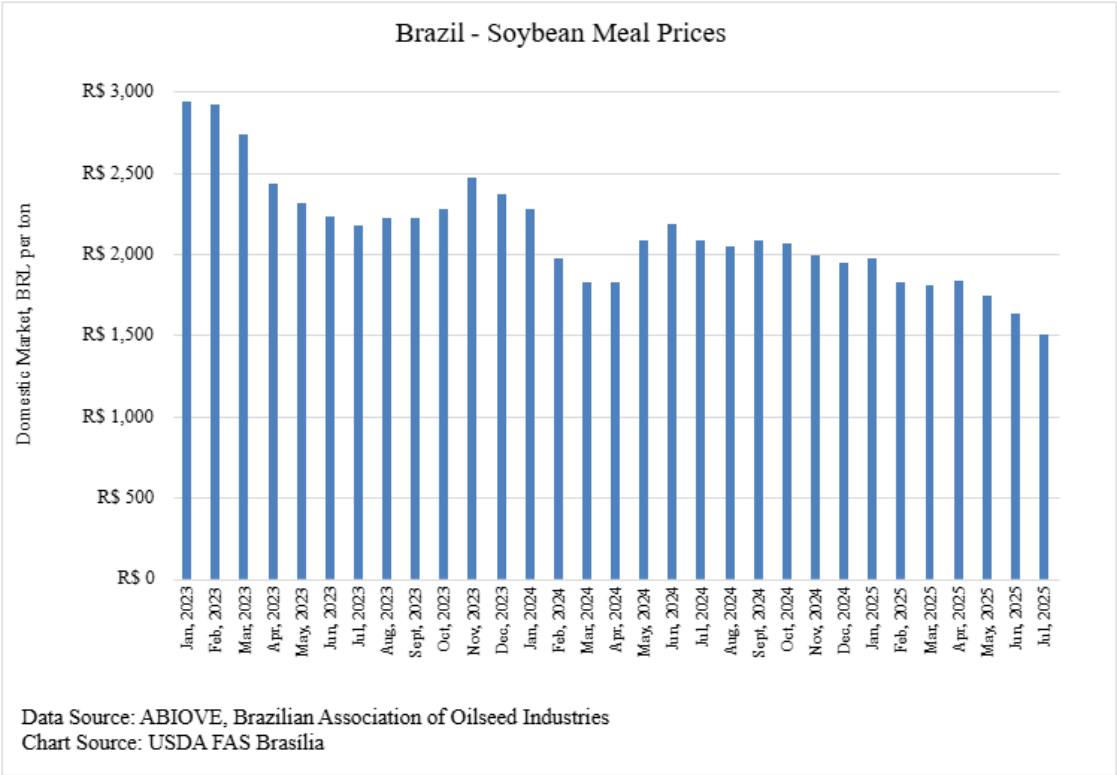
Brazil – Corn Prices



Soybean

As of August 12th, the WASDE forecasts Brazil’s soybean production at 175 MMT for MY 2025/26, due to increased planted area, better weather conditions and cultivation practices. Brazil remains the world’s largest soybean producer.

Figure 8
Brazil – Soybean Meal Prices



Impact of Feed Costs on Production

In August 2025, feed prices for chickens were 2.5 percent cheaper than in the past 12 months. For 2026, Post estimates that large corn and soybean crops will continue to positively impact the poultry industry, lowering feed costs and making it easier for producers to balance other production costs, as seen in the following subsection.

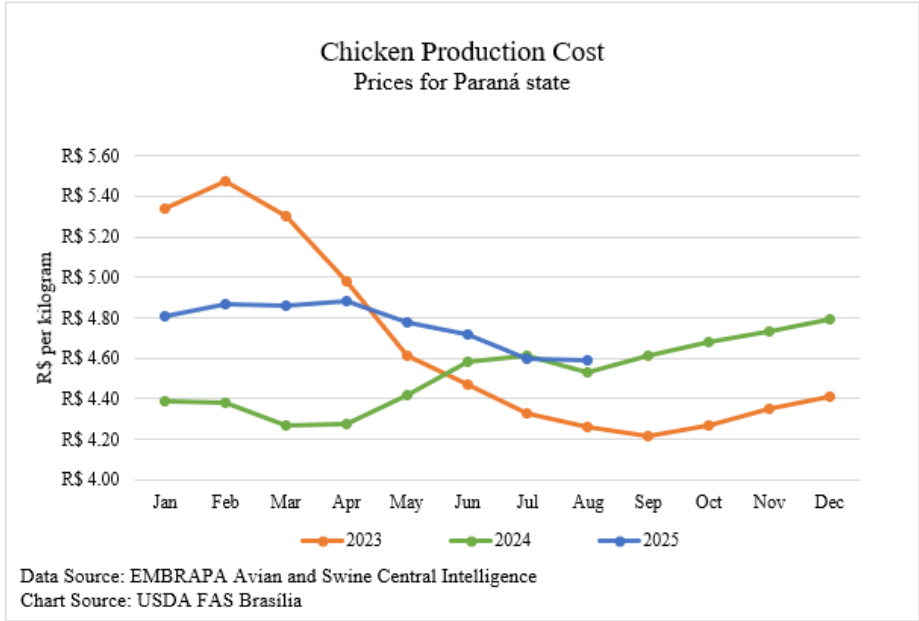
1.5.2. Other Production Costs

The state of Paraná serves as a national reference for poultry costs, due to the size of its operations, as noted above in subsection 1.2 Production by States. The table in Figure 9 shows Paraná producers experienced higher production costs per kilogram in 2025 when compared to the previous year. In the first eight months of 2025, production costs averaged R\$ 4.76 (USD 0,86) - see more details in Figure 10 Poultry Production Costs. For

2026, Post forecasts production costs to remain relatively stable from 2025, as improvements are forecasted in corn and soybean crops. International demand and the devalued Brazilian currency will also favor production, which is estimated to reach 15.8 MMT in 2026.

Figure 9

Chicken Production Cost for Paraná State



The Brazilian Company of Agricultural Research (EMBRAPA) compiles an index for poultry production costs, called *ICPFrango*. In August 2025, feed costs accounted for close to two thirds of total production costs in the state of Paraná. Other expenses including investments in genetics, cost of labor, electricity, bedding, heating, and transportation also compose production costs. The table in Figure 10 shows that, in August 2025, the largest increase in costs for the sector was for capital costs.

Figure 10

Poultry Production Costs

| Poultry Production Costs - August, 2025 | | | |
|--|------------------------------|---|---------------------|
| Item | Value difference in the year | Value difference compared to previous 12 months | Percentage of total |
| Feed | -8.65% | -2.53% | 63.98% |
| Genetics | +5.60% | +16.51% | 17.82% |
| Labor | +0.05% | -2.31% | 4.60% |
| Sanitary | +9.02% | +9.02% | 0.92% |
| Electric Energy/ Bed/ Heating | +1.09% | +1.45% | 2.30% |
| Maintenance/ Insurance | 0.00% | 0.00% | 0.72% |
| Transportation | +1.88% | +1.88% | 1.53% |
| Funrural - Assistance Fund for Rural Workers | -8.14% | +8.22% | 0.17% |
| Others | +0.93% | +1.87% | 0.24% |
| Depreciation | 0.00% | 0.00% | 2.69% |
| Capital Cost | +17.68% | +12.33% | 4.90% |
| Total | -4.09% | +1.47% | 100% |

Data Source: EMBRAPA Swine and Poultry, ICPFrango
Chart Source: USDA FAS Brasília

Figure 11 presents prices for live chickens, soybean meal, and corn in the state of Paraná from January 2022 to August 2025. As shown in the table, the average price of live chickens during the period was 8.2 percent higher when compared to that experienced in the previous year.

Figure 11

Prices for Paraná State

| Prices for Paraná state - R\$/kilogram | | | | | | | | | | | | | |
|--|------|------|------|------|------|------|------|------|------|------|------|------|------|
| | Year | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| Live Chicken | 2022 | 5.08 | 5.09 | 5.36 | 5.69 | 5.58 | 5.58 | 5.53 | 5.47 | 5.39 | 5.23 | 5.19 | 5.14 |
| | 2023 | 5.00 | 4.98 | 4.91 | 4.86 | 4.77 | 4.54 | 4.40 | 4.48 | 4.46 | 4.47 | 4.53 | 4.63 |
| | 2024 | 4.59 | 4.55 | 4.53 | 4.46 | 4.45 | 4.32 | 4.45 | 4.64 | 4.66 | 4.56 | 4.63 | 4.61 |
| | 2025 | 4.46 | 4.64 | 4.67 | 5.07 | 5.25 | 4.97 | 5.01 | 4.92 | | | | |
| Soybean Meal | 2022 | 2.73 | 3.00 | 3.18 | 2.79 | 2.59 | 2.54 | 2.73 | 2.66 | 2.78 | 2.85 | 2.81 | 3.03 |
| | 2023 | 3.15 | 3.09 | 2.88 | 2.57 | 2.41 | 2.32 | 2.44 | 2.41 | 2.40 | 2.40 | 2.63 | 2.51 |
| | 2024 | 2.28 | 2.12 | 1.98 | 2.01 | 2.28 | 2.31 | 2.24 | 2.15 | 2.25 | 2.26 | 2.19 | 2.13 |
| | 2025 | 2.08 | 2.02 | 1.96 | 1.93 | 1.83 | 1.81 | 1.80 | 1.69 | | | | |
| Corn | 2022 | 1.64 | 1.68 | 1.67 | 1.46 | 1.51 | 1.48 | 1.38 | 1.40 | 1.41 | 1.42 | 1.43 | 1.40 |
| | 2023 | 1.44 | 1.42 | 1.38 | 1.21 | 0.96 | 0.92 | 0.91 | 0.88 | 0.85 | 0.88 | 0.90 | 0.98 |
| | 2024 | 0.99 | 0.96 | 0.94 | 0.96 | 0.97 | 0.97 | 0.96 | 0.98 | 1.00 | 1.09 | 1.16 | 1.16 |
| | 2025 | 1.18 | 1.22 | 1.30 | 1.23 | 1.12 | 1.05 | 1.00 | 1.01 | | | | |

Data Sources: EMBRAPA Avian and Swine Central Intelligence and Paraná Secretariat of Agriculture and Food Supply - DERAL
Chart Source: USDA FAS Brasília

Throughout 2025, the industry worked to adjust production by increasing placement when needed. Post contacts also note that during the pandemic, the poultry industry made substantial investment to increase production. These investments point to idle capacity in production, which can be utilized if profit margins increase for producers.

For 2026, Post forecasts Brazil will see 3 percent growth in production. As idle capacity is available, producers will continue to balance placement levels, international and domestic demand to production levels. The forecasts in this report assume continuation of Brazil's sanitary status and any related policies as of September 22, 2025.

1.5. Sanitary Status

1.5.1. Avian Influenza

On May 15, 2023, Brazil reported the first discovery of infected wild birds to the World Organization for Animal Health (WOAH), in the state of Espírito Santo. From there, the disease spread and reached seven other states: Bahia, Mato Grosso do Sul, Paraná, Rio de Janeiro, Rio Grande do Sul, Santa Catarina, and São Paulo.

Exactly two years later, on May 15, 2025, the Ministry of Agriculture and Livestock (MAPA) confirmed that a commercial poultry breeding plant, raising chickens for production of fertile eggs for broiler or laying hens, was infected with HPAI. The detection was in the state of Rio Grande do Sul, in the municipality of Montenegro. Rio Grande do Sul is Brazil's third-largest chicken producing state, responsible for 9.7 percent of all the country's production in the first half of 2025.

The affected plant contained 17,000 chickens separated into two production facilities. In one, all animals died of the disease, while in the other 80 percent died of the disease, and the remainder were culled. The plant focused on fertile egg production, and all material produced in the facility – 30,000 eggs – was traced for proper elimination. By May 18th, all culling and egg elimination had been concluded.

Immediately following the detection, Brazil notified WOAH and liaised with governments worldwide to give notice of the outbreak and Brazilian government actions taken. Trade restrictions related to the export of chicken meat, chicken products, eggs and egg products followed. Trade restrictions varied according to negotiated health certificates, per country and per product. Restrictions varied at the country-level, state-level, and municipality-level, depending on the regionalization clauses agreed to between Brazil and its trading partners.

As of September 22nd, Brazil had 185 cases of HPAI, one in a commercial plant, 12 in backyard flocks and the rest in wild birds. Brazil is currently free of HPAI for commercial purposes. The map in Figure 13, prepared by MAPA, shows the locations (white with red border) where HPAI cases have been confirmed. In gray are cases where laboratory testing dismissed possible cases, and in yellow are active investigations. Triangles mark cases on commercial plants, hexagons mark backyard cases, and circles mark wild bird cases. MAPA has prepared a complete public-facing [dashboard](#) to provide additional details for all HPAI cases.

For further information on details regarding the discovery of the disease in Brazil and measures taken by the Government of Brazil in response to the discovery and planned future actions, please refer to Post's previous [Poultry and Products reports: Report BR2023-0022](#), [BR2024-0002](#), [BR2024-0028](#), and [BR2025-0005](#). For more information on the commercial plant case and the immediate trade restrictions imposed by different trading partners, please consult [BR2025-0015](#).

Figure 12

Brazil HPAI Cases – As of September 22, 2025.



Data Source: Brazilian Ministry of Agriculture and Livestock, Poultry Respiratory and Nervous Syndrome Dashboard

The majority of cases were on, or close to, shorelines. This corresponds with the migratory routes of wild birds that pass through Brazil. Industry and government together have implemented crisis management protocols which have proven to be effective in response to the commercial plant case. Monitoring and biosafety measures have been strengthened at all levels, from government measures to industry investments and media campaigns to inform the general public.

1.5.2. Newcastle Disease

On July 17th, 2024, MAPA confirmed an outbreak of Newcastle Disease (NCD) in a commercial poultry plant located in Anta Gorda, in the state of Rio Grande do Sul. Prior to this occurrence, the most recent cases of the disease in Brazil were in 2006 in backyard birds in the states of Amazonas, Mato Grosso and Rio Grande do Sul. Several Post's contacts agree the incident was an isolated case and likely a consequence of hail that broke the ceiling of the poultry house, killing 7,000 animals, and opening the door for disease to spread. After the disease was confirmed, another 7,000 chickens were culled in the plant. NCD tracking is available on the same MAPA dashboard: the Poultry Respiratory and Nervous Syndrome dashboard. For more details on government measures taken from the outset of the outbreak, please consult Post's Poultry and Products Annual Report [BR2024-0028](#).

2. Consumption

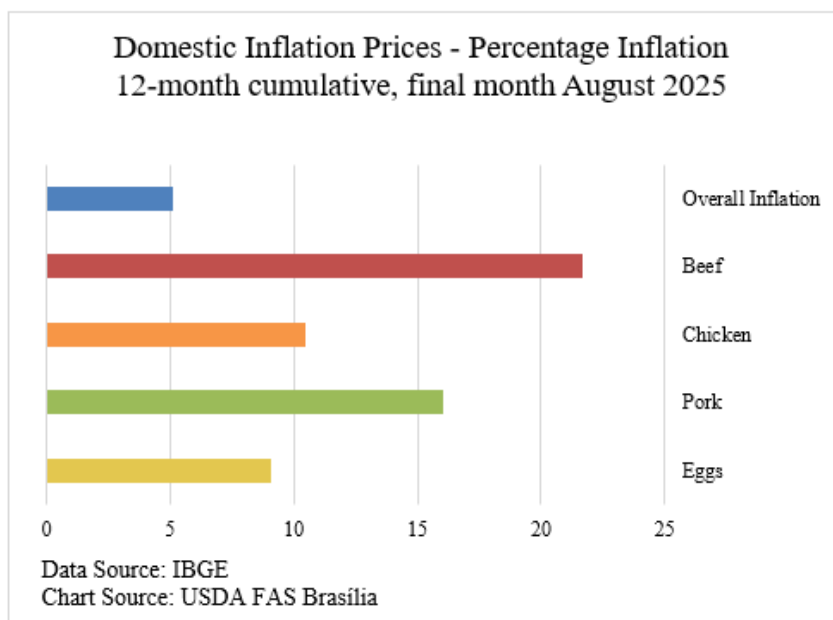
Post forecasts domestic chicken consumption in 2026 at 10.7 MMT RTC, growing 3 percent from the previous year. Post anticipates that 68 percent of the Brazilian chicken production will be destined for the domestic market in 2026. For 2025, Post estimates domestic consumption at 10.3 MMT RTC.

The Brazilian Central Bank (BCB) forecasts moderate economic performance in 2026, with GDP growth at 1.80 percent, following 2.16 percent growth in 2025, per the latest data available from the BCB Focus Bulletin. The inflation rate is forecasted at 4.29 percent in 2026, and 4.83 percent in 2025. Domestic consumption can potentially benefit from social aid programs to the population in most need, as well as from an increased minimum wage. The Institute of Geography and Statistics (IBGE) reports 6.3 million unemployed people in the second quarter of 2025 and an additional 2.8 million people who have stopped looking for a job. While these factors may negatively impact households' purchasing power and thus consumption, the high costs of other animal protein sources, such as beef, will lead to an increase in consumption.

Chicken remains the most widely consumed animal protein in Brazil, as it is commonly the substitute for preferred, but more expensive, beef. As seen in Figure 13, inflation in the domestic retail market for chicken increased in the past 12-month cumulative, per official IBGE data.

Figure 13

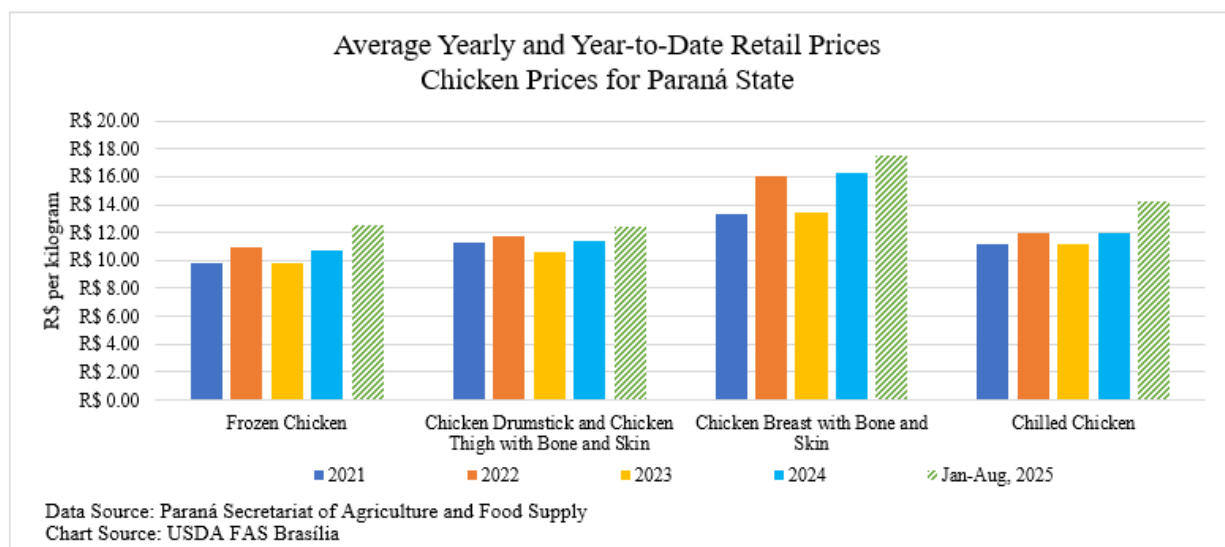
Domestic Retail Prices Percentage Inflation



The state of Paraná serves as the reference for chicken production in Brazil. The state's Secretariat of Agriculture and Supply monitors different cuts compared to IBGE surveys, and their data shows the variation in prices, as demonstrated in Figure 14.

Figure 14

Average Yearly and Year-to-date Retail Prices – Chicken – Paraná state



As seen in Figure 14, prices in the period January-August, 2025 increased in every category when compared to the previous year. Despite increased prices to consumers, Post forecasts a 3 percent increase in domestic consumption in 2026, as production levels are forecasted up. Additionally, chicken meat competes with other animal protein sources: beef consumption is estimated down and pork consumption is forecasted stable in 2026. For more information on beef and pork production and consumption in Brazil, please refer to Post's Livestock Annual Report, [BR2025-0024](#).

3. Trade

3.1. Exports

Post forecasts Brazil will remain the world's largest exporter of chicken meat in 2026, a position it will continue to hold despite the 2025 HPAI incidence and its impact on trade in 2025. Chicken meat exports are forecasted at 5.1 MMT RTC in 2026, which represents a 2 percent increase from the estimated exports of 5.0 MMT RTC in 2025. Post forecasts exports will account for 32 percent of all production in Brazil in 2026.

Note that Post and official USDA forecasts do not include chicken paws, but official Brazilian statistics do. Furthermore, Post and official USDA forecasts consider policy in place. As of September 22nd, some countries were still restricting imports from Brazil due to HPAI in a commercial plant case, most significantly the PRC, impacting the export forecast for 2026 and the 2025 estimates.

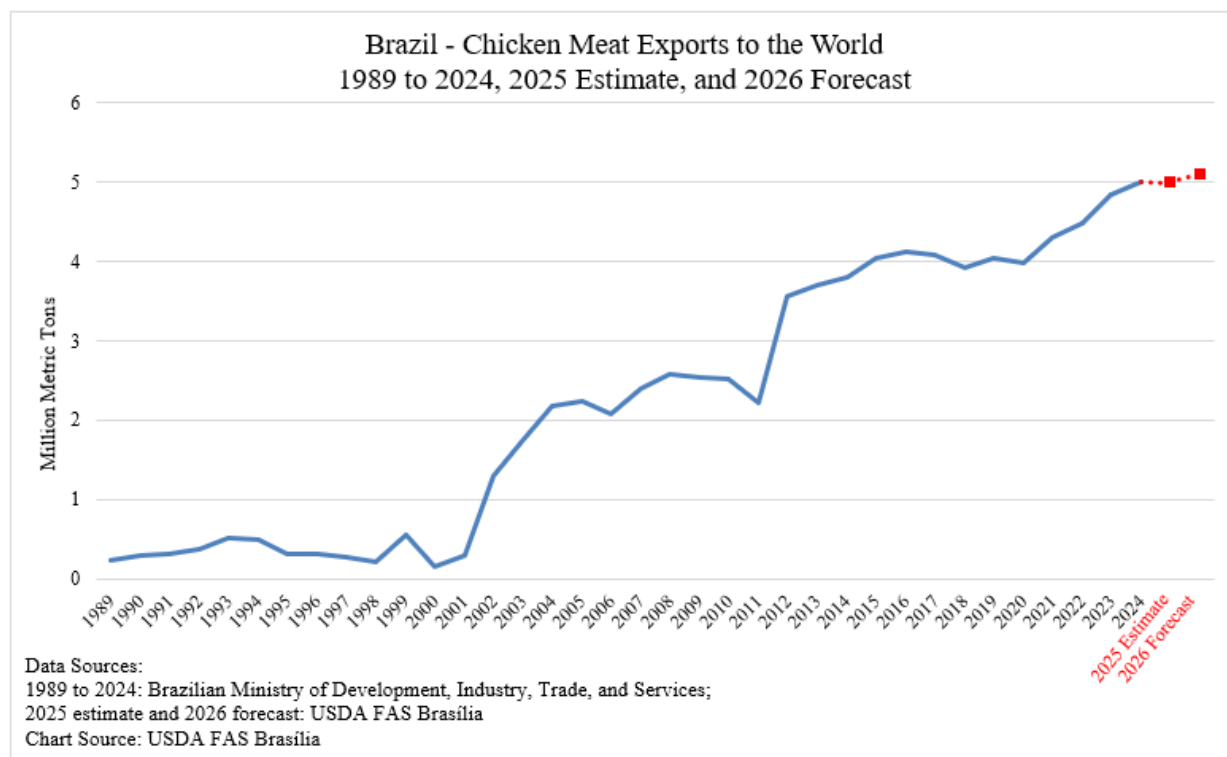
These forecasts are based on increased production; estimated exports; Brazil's current sanitary status as free from HPAI in commercial plants; price competitiveness; and, competitor exporters facing challenges with production due to animal disease.

Official Brazilian government data from the Ministry of Development, Industry, Trade, and Services (MDIC) indicate that in the period of January-August, 2025, Brazil exported 1.5 percent less than in the same period in 2024, exporting 3.2 MMT of chicken meat (including paws).

The graph in Figure 15 shows the evolution of Brazil’s exports of chicken meat to the world since the beginning of the historical series.

Figure 15

Brazilian Chicken Meat Exports to the World



Post’s 2026 forecast results from consistent external demand, new market openings, increased domestic consumption, and devalued – although improving – local currency, which incentivizes producers to export, and hence gain more for the investments they have made to increase production capacity in recent years. Figure 3 shows the fluctuation of the exchange rate in the last few years.

Per USDA data, Brazil will be responsible for over 36 percent of global exports of chicken meat in 2025. Brazil is followed by the United States and the European Union as the top three largest exporters. Together, the United States and the EU account for an additional 33 percent of global exports.

HPAI and NCD Trade Implications

Since the discovery of HPAI in Brazil in May 2023, and for the duration of two years, Brazil was successful in keeping the disease from reaching commercial poultry production plants. Following the May 2025 commercial plant case, restrictions were imposed by several trading partners. As of September 4th, 2025, the following countries were still imposing restrictions on trade of chicken meat and products from Brazil due to the HPAI case. Restrictions at the country-level include: Canada, PRC, Malaysia, Pakistan, and East Timor. The European Union has lifted suspension. Countries with state-level restrictions include: Armenia, Belarus, Kazakhstan, Oman, Kyrgyzstan, Russia, Tajikistan, and Ukraine. Countries with zone-level restrictions include: Mauritius, Saint Kitts and Nevis, Suriname, and Uzbekistan. Japan is restricting trade from the municipalities of Campinópolis and Santo Antônio da Barra, not due to the May case, but due to two backyard cases.

On September 22, Brazil had 12 backyard cases in eight different states. For all cases, Japan's agriculture authorities closed its markets to the states and/or municipalities where the cases occurred, allowing trade only from areas that formalized regionalization agreements with Japan. In July 2023, Japan moved from state-level regionalization to municipal-level regionalization agreement with Brazil. Japan was the only country to impose suspensions derived from the backyard findings.

In July 2024, Brazil had its first case of NCD since 2006. Authorities immediately voluntarily suspended exports. The suspension was established at different levels. For some markets, the government imposed a total restriction on exports, and for others it applied regional restrictions either by state, by 10-km radius, or by municipality. The government also differentiated its suspension by type of products. For certain countries such as Argentina, South Africa, and Chile, trade restrictions did not apply to thermal-processed poultry products. The Brazilian government acted quickly through its agricultural attachés worldwide to inform trading partners about the case and share the actions taken.

Regionalization

MAPA continues to diligently work on negotiating regionalization agreements with major importing countries to mitigate future potential outbreaks of HPAI or NCD in commercial plants. MAPA's work towards negotiating health certificate modifications individually with its trading partners was essential in Brazil's quick recovery in exports after the discovery of the May 2025 HPAI case.

For certain countries, regionalization is applied to a specific kilometer radius from the focus areas, with an additional radius for monitoring. For other trading partners, regionalization is done at the state-level, and for others at the municipality-level. A list of which countries with which Brazil has been able to secure such agreements and at what level is not publicly available. Some health certificates do not mention HPAI or NCD specifically, leading importers to decide for each occurrence what course of action to take, whether suspension is warranted or not, to consider internal food security demands. As the world's poultry largest exporter, some markets are inclined to regionalize imports from Brazil to maintain availability of a low-cost or preferred animal protein.

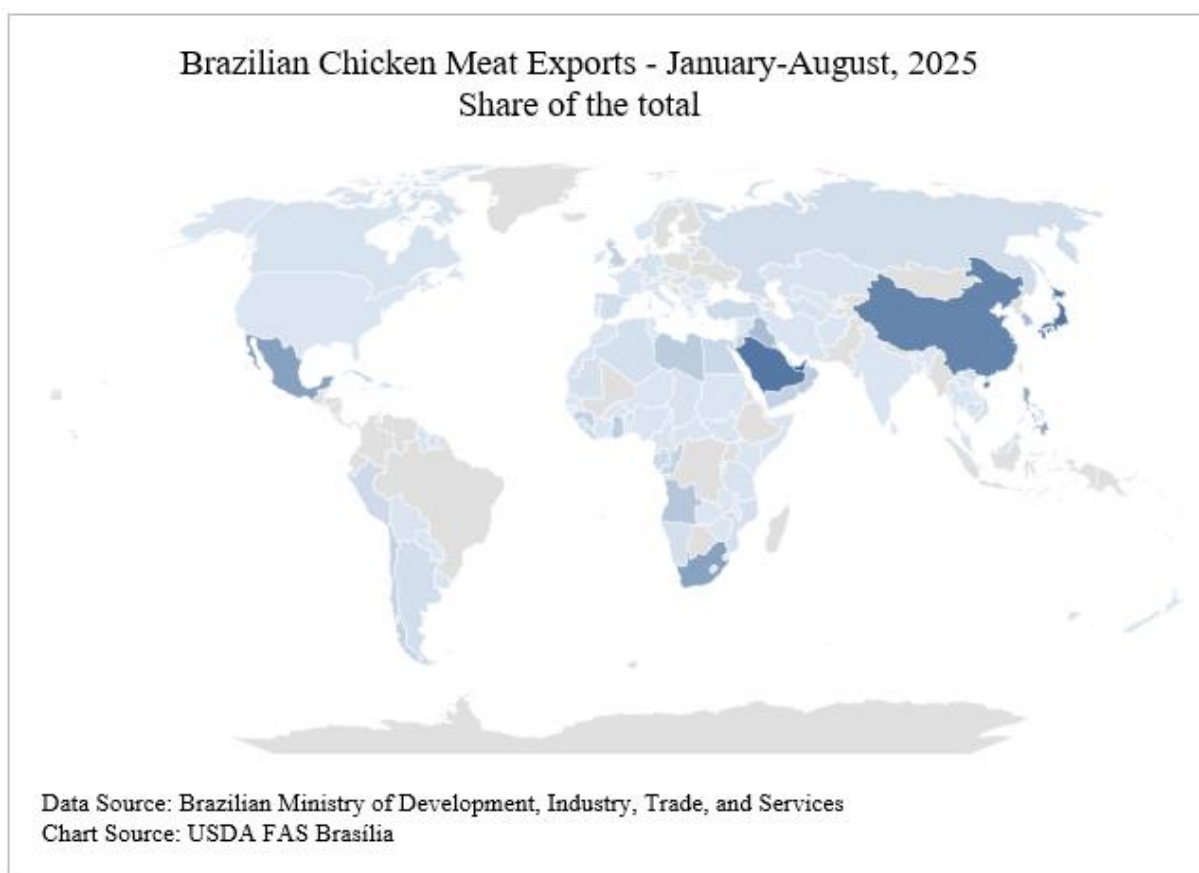
Trading Partners

Different from other animal protein where exports are more concentrated in specific countries, Brazil's exports of chicken meat are diversified. In the period of January-August, 2025, Brazil exported over 3.2 MMT of chicken meat and chicken products to 158 countries.

The map in Figure 16 shows Brazil's chicken meat exports to the world. The darker the color, the more exports to that country.

Figure 16

Brazilian Chicken Meat Exports – Share of the Total, January-August, 2025

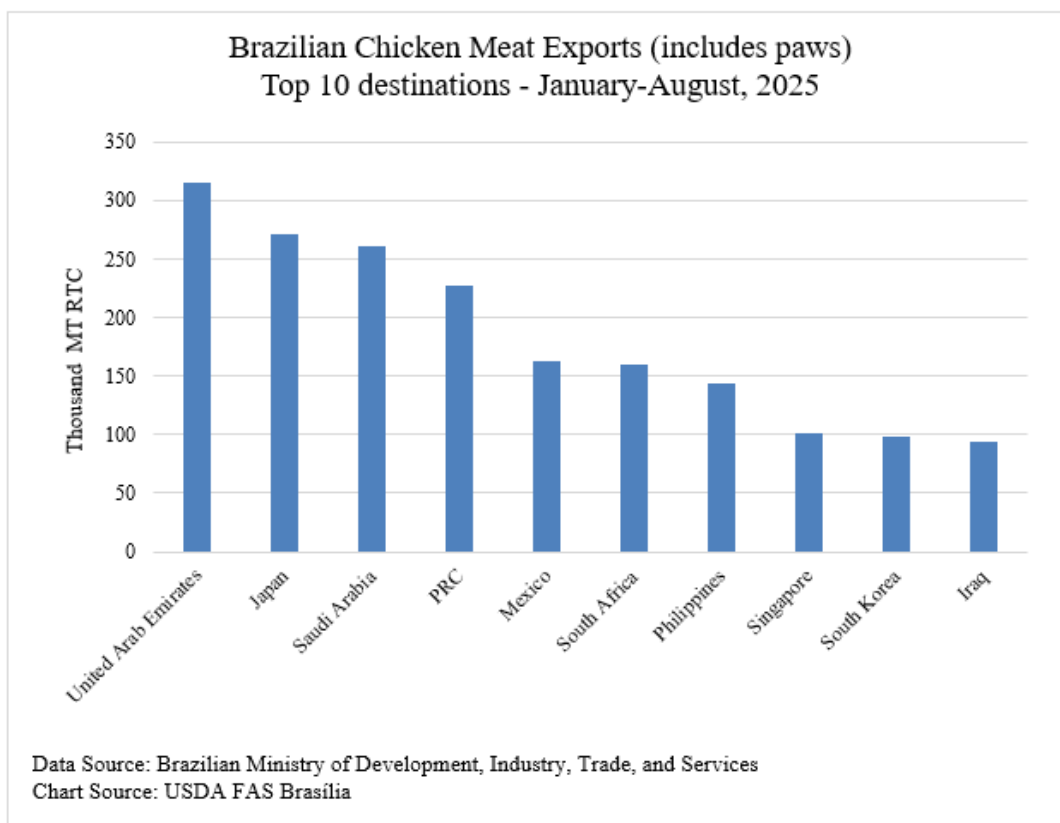


The United Arab Emirates, Japan, Saudi Arabia, PRC, and Mexico compose the top five destinations to which Brazil exported chicken meat in the period of January-August, 2025. Brazil exported 1.24 MMT to these countries during this period, accounting for 38.6 percent of all exports.

The top 10 destinations are seen in Figure 17. The represented countries have been consistent export destinations for Brazil.

Figure 17

Brazilian Chicken Meat Exports – Share of the Total – Top 10 destinations, January-August, 2025



People's Republic of China (PRC)

In terms of trading partners, Brazil's main market has historically been the PRC since 2019. This was a position PRC held until May 2025, when the HPAI outbreak occurred in a commercial plant and trade was suspended. Since the suspension, PRC has been surpassed by the United Arab Emirates as Brazil's largest trading partner in the subsequent months. The PRC is currently Brazil's fourth-largest market in the period of January-August, 2025. In the first five months of 2025 before trade was suspended, the PRC was the destination of 10.7 percent of all chicken meat and chicken products exports out of Brazil.

Post contacts have shared that a delegation from the Chinese government is scheduled to visit Rio Grande do Sul starting on September 22, 2025, to assess Brazil's sanitary status in order to reopen trade for Brazilian chicken meat and products. The Brazilian Minister of Agriculture and Livestock has publicly stated that Beijing has signaled that the market should be reopened soon. As previously mentioned in this section of the report, Post forecasts use policy in place, and does not include trade to the PRC until trade has officially resumed.

In 2024, Brazil exported 11 percent of all chicken meat exports to PRC. Figure 19 shows the monthly exports since 2023. In January 2025, Brazilian exports to PRC were 9.5 percent higher than in the same month in 2024.

Figure 18

Brazilian Monthly Chicken Meat Exports to PRC



As seen from the graph, exports to PRC plummeted starting in June, 2025. A sharp decrease is also seen in August 2024. On that occasion, Brazil self-imposed restrictions for exports to PRC after NCD was detected in Rio Grande do Sul in mid-July of 2024. Although Brazil lifted the self-suspension after approximately one week, the Chinese General Administration of Customs (GACC) and Ministry of Agriculture and Rural Affairs (MARA) prohibited imports of poultry and poultry products from Rio Grande do Sul on August 2, 2024.

Despite meetings between the Brazilian and Chinese governments to review and update the sanitary and phytosanitary protocols between the two countries, the state of Rio Grande do Sul continues to be under suspension. In May 2025, there were talks of the market reopening, but the HPAI case in a commercial plant in the state led to the maintenance of its suspension, along with the rest of the country.

Brazil currently has 81 plants authorized to export poultry and poultry products to the PRC – a 42 percent increase in number of plants authorized to export poultry products to PRC since the publication of Post’s semi-annual report in March, 2025. Of the plants authorized to ship to PRC, 13 are in Rio Grande do Sul; 30 in Paraná; 15 in Santa Catarina; 5 in São Paulo; 9 in Minas Gerais; and, the remainder in other states. Brazil continues to seek an agreement to regionalize exports to guard against the potential recurrence of diseases such as HPAI and NCD.

Post Beijing notes in their Poultry and Products Report, [CH2025-0170](#), PRC is forecasted to increase domestic production in 2026, as large vertically integrated white broiler producers continue expanding capacity despite persistent low margins. This can potentially affect the level of imports from Brazil, if trade is reopened.

Halal Markets

Brazil continues to focus its exports on halal markets, such as the United Arab Emirates and Saudi Arabia. The two countries have been long-term and firm partners for Brazil. August 2025 marked a milestone for Brazilian poultry producers: 50 years since the first export of Brazilian poultry. The destination was Kuwait, and it marked the beginning of a strong partnership with countries in the Middle East. Brazil is currently the largest halal chicken meat producer in the world, with more than 2 MMT exported annually. Halal production in Brazil follows traceability criteria and sanitary requirements in partnership with certifying and religious authorities.

United Arab Emirates

The United Arab Emirates (UAE) became the largest destination for Brazilian chicken meat exports in the period January-August 2025, reaching close to 315,550 tons and decreasing 0.7 percent when compared to the same period the previous year. Brazil currently has 11 plants authorized to export poultry meat and products to the UAE.

Japan

Japan was the second-largest destination for Brazilian chicken meat exports in the first eight months of 2025, with a little over 271,500 tons exported, decreasing exports by 9.6 percent. Brazil currently has over 140 plants authorized to export poultry meat and products to Japan.

Saudi Arabia

Saudi Arabia was the third-largest destination for Brazilian chicken meat exports in the period of January through August, 2025, reaching 260,500 tons, a 0.5 percent increase from the same period the previous year. Brazil currently has 23 plants authorized to export poultry and products to Saudi Arabia.

Mexico

Mexico was the fifth-largest destination for Brazilian chicken meat exports in the first eight months of 2025, with a little over 163,400 tons exported, a 46 percent increase from the same period the previous year. In August 2025, Mexico was Brazil's largest trading partner, with 37,600 tons exported, which represents an eight-fold increase from the same month the previous year.

In September 2025, Brazil received a delegation of Mexican officials to audit plants to extend the list of plants authorized to export to Mexico. Brazil currently has close to 90 plants authorized to export poultry meat and products to Mexico.

European Union and the European Free Trade Association

From January-August 2025, Brazil exported a little over 113,500 tons of chicken meat and products to the European Union (EU), of which nearly a quarter was salted poultry. In February 2024, the EU implemented an electronic health certificate for poultry exports. As the system consolidates and producers become more familiar with the process for electronic certification, the expectation is to continue expanding exports to Europe.

On September 16, 2025, Mercosur and the European Free Trade Association (EFTA) signed a free trade agreement, following negotiations that began in June 2017. In the first eight months of 2025, Brazil exported approximately 9,600 tons of chicken meat and products to EFTA countries. The agreement established a quota of 1,000 tons of chicken meat per year with a zero tariff, to be distributed between the Mercosur countries. Brazilian poultry representatives have expressed excitement with the announcement and noted that the immediate effects will be focused on Switzerland, where 99 percent of poultry exports to EFTA countries concentrate.

Diversifying trading partners

New Markets Opening

The Brazilian Ministry of Agriculture and Livestock (MAPA), along with the Brazilian Ministry of External Affairs continue to expand the consumer pool for Brazil – by opening new markets or by diversifying products to existing markets.

As of September 17, 2025, Brazil has opened 137 new markets in several countries, of which 24 were related to poultry and poultry products. As a comparison, in the entire year of 2024, Brazil opened 222 new markets, of which 23 were for poultry and poultry products. These new market openings are a targeted effort by MAPA officials in creating a more diverse and comprehensive , further spreading Brazilian poultry and poultry products to the world.

The market openings for poultry and poultry products from Brazil in 2025 were: powdered eggs for animal feed to Argentina; day-old chick and fertile eggs to Benin, Burkina Faso, and South Korea; duck and turkey meat to PRC; chicken offal to PRC and Vietnam; poultry feathers to South Korea; live poultry to the UAE; chicken meat to the Grenadines, Sarawak – Malaysia, and Saint Vincent; poultry fat-based products to Japan; powdered egg and granulate egg to Mexico; poultry hydrolyzed protein and poultry oil for animal feed to Peru; poultry meat and poultry products to the Bahamas and Suriname; and, egg and egg products to the European Union.

Market Dispute - Indonesia

Since 2014, Brazil has had an open case at the World Trade Organization (WTO) against Indonesia on measures imposed to block Brazil's access to its chicken meat market. Brazil won the case, but Indonesia requested a reasonable deadline to adopt the measures suggested by the WTO. In December 2020, Indonesia appealed into the void of the WTO Dispute Settlement Appellate Body. This further delayed the adoption of the recommendations, as the body has not been functional due to the lack of appointed members.

For more on this case, please refer to Post's 2022 and 2023 Poultry and Products Annual Report, report number [BR2022-0051](#) and report number [BR2023-0022](#). On August 19, 2025, the countries signed an agreement on sanitary requirements for Brazil to export beef to Indonesia. As the sanitary system in Brazil covers all animal

protein products, this agreement will likely facilitate implementation of the WTO decision regarding chicken meat. Post will continue to monitor the case.

3.2. Imports

Post forecasts chicken meat imports for 2026 at 5,000 MT, stable from 2025. In the period January-August, 2025, Brazil imported 3,500 MT in frozen chicken cuts and edible offal, originating from Argentina and Chile.

Annex 1



Attachments:

No Attachments