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Report Highlights:

Brazil is the third-largest chicken meat producer and the largest chicken meat exporter in the world. Post forecasts chicken meat production will increase in 2027 due to consistent external demand, a lower currency valuation, lower production costs, increased domestic consumption, and despite sluggish socio-economic performance. Brazil is currently free from Highly Pathogenic Avian Influenza (HPAI) in commercial plants. Post forecasts both domestic consumption and exports to increase in 2027 as Brazil opens new markets and diversifies exports to existing markets.

EXECUTIVE SUMMARY

Production

Brazil is the third-largest chicken meat producer in the world after the United States and China. Chicken meat production in 2027 is forecast at 16.3 million metric tons (MMT), a two percent increase from 2026 and a record high for Brazil. This forecast is based on consistent external demand and improved domestic consumption, despite sluggish socio-economic performance. Brazil's commercial plants are currently free from Highly Pathogenic Avian Influenza (HPAI).

Consumption

Post forecasts domestic chicken consumption in 2027 at 10.8 MMT, a one percent increase from 2026, as decreased consumption of beef is expected. Post anticipates 66 percent of Brazilian chicken production will be consumed domestically in 2027.

Trade

Brazil is forecast to remain the world's largest exporter of chicken meat in 2027 at 5.5 MMT, an increase of four 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 2027, coming from Argentina and Chile.

Figure 1

Chicken Meat Production, Supply, and Distribution

Meat, Chicken Market Year Begins Brazil	2025		2026		2027	
	Jan 2025		Jan 2026		Jan 2027	
	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)	15450	15450	15800	16000	0	16300
Total Imports (1000 MT)	5	5	5	5	0	5
Total Supply (1000 MT)	15455	15455	15805	16005	0	16305
Total Exports (1000 MT)	4970	4970	5150	5300	0	5500
Human Consumption (1000 MT)	10485	10485	10655	10705	0	10805
Other Use, Losses (1000 MT)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT)	10485	10485	10655	10705	0	10805
Total Use (1000 MT)	15455	15455	15805	16005	0	16305
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	15455	15455	15805	16005	0	16305
(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Source: Not Official USDA Data

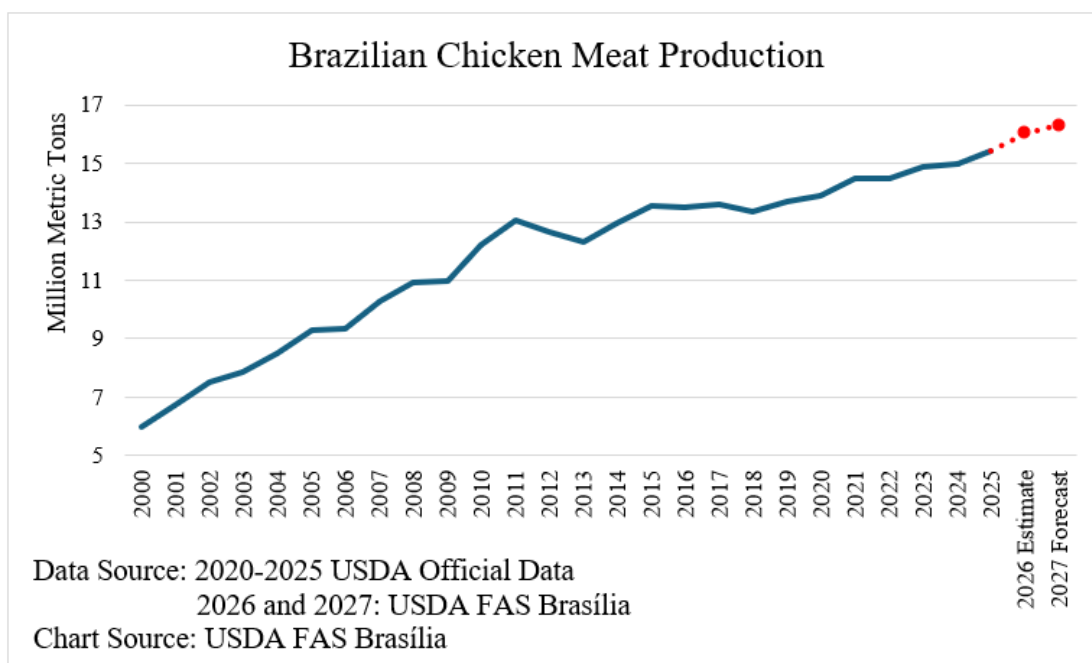
POULTRY

1. Production

Brazil is the third-largest chicken meat producer in the world behind the United States and China, responsible for over 14 percent of global production. Post forecasts chicken meat production in 2027 to increase two percent from the estimated four percent increase in 2026, reaching 16.3 million metric tons (MMT). This forecast is based on consistent external demand, lower currency valuation, reduced production costs, and increased domestic consumption, despite sluggish socio-economic performance expected for the country. Post forecasts that production in 2027 will reach record levels, as presented in Figure 2.

Figure 2

Brazilian Chicken Meat Production, 2000-2025 and 2027 Forecast



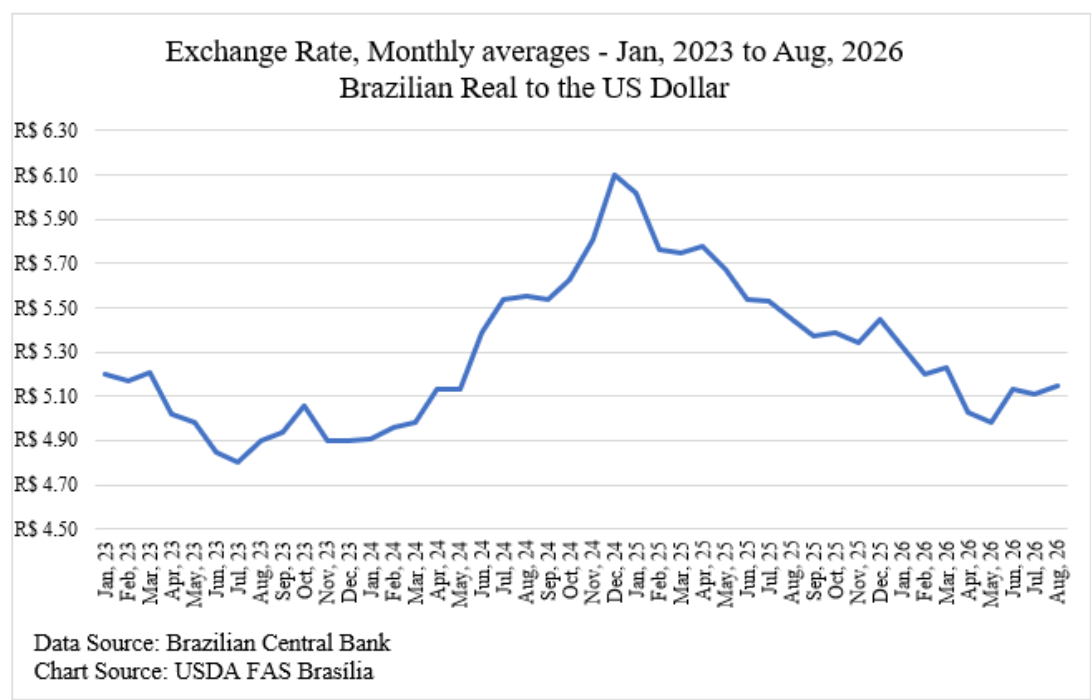
1.1. Socio-Economic Factors to Weigh on Production

The Brazilian Central Bank (BCB) forecasts GDP to grow 1.50 percent in 2027, following 1.93 percent growth in 2026. The Central Bank Focus Survey published on September 4th anticipates inflation at 4.29 percent in 2027, following a 5.00 percent in 2026. The exchange rate for the Brazilian real to U.S. dollars is forecast at R\$5.30 to USD1.00 in 2027. The Brazilian real has remained steady against the US

dollar over the past year, but remains above historical averages of the past decade, affecting production and exports.

Figure 3

Average Monthly Exchange Rate – January 2023 to August, 2026



The Institute of Geography and Statistics (IBGE) reports that 5.9 million Brazilians were unemployed in the second quarter of 2026, representing a 5.4 percent unemployment rate. However, an additional 2.3 million Brazilians stopped looking for work, bringing the total underutilized rate to 12.9 percent. Other factors, such as high interest rates, tariffs and taxes, fiscal uncertainties, and regulatory issues impact producers’ investment, risk management, and production decisions.

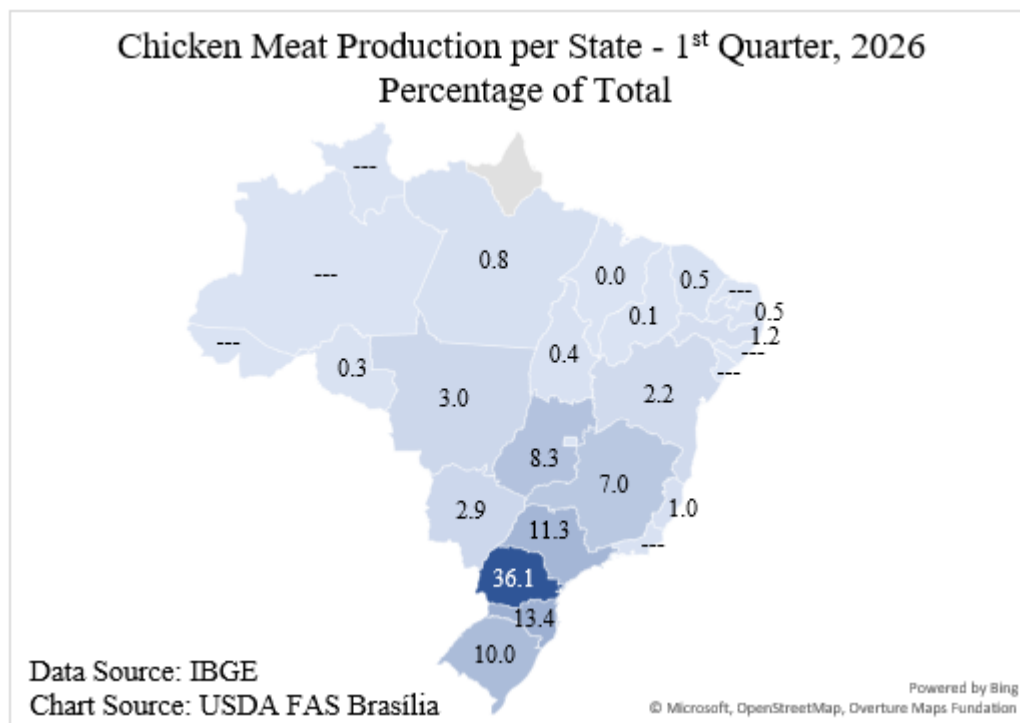
1.2. Production by States

Figure 4 shows chicken meat production across Brazil in the first quarter of 2026. The darker the color, the higher the percentage of Brazilian slaughter 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 with 59 percent of national chicken production. Paraná state is the single largest producer, responsible for 36.1 percent of total chicken meat coming out of Brazil in the first quarter of 2026, followed by Santa Catarina, São Paulo, Rio Grande do Sul, and Goiás states. States marked with “---” are those where production takes place, but the amount of establishments in the state is small enough that sharing the exact production

numbers would disclose sensitive company data. Second quarter preliminary data shows stable production during the first quarter.

Figure 4

Brazilian Chicken Meat Production by State – First Quarter, 2026 – Percentage of Total



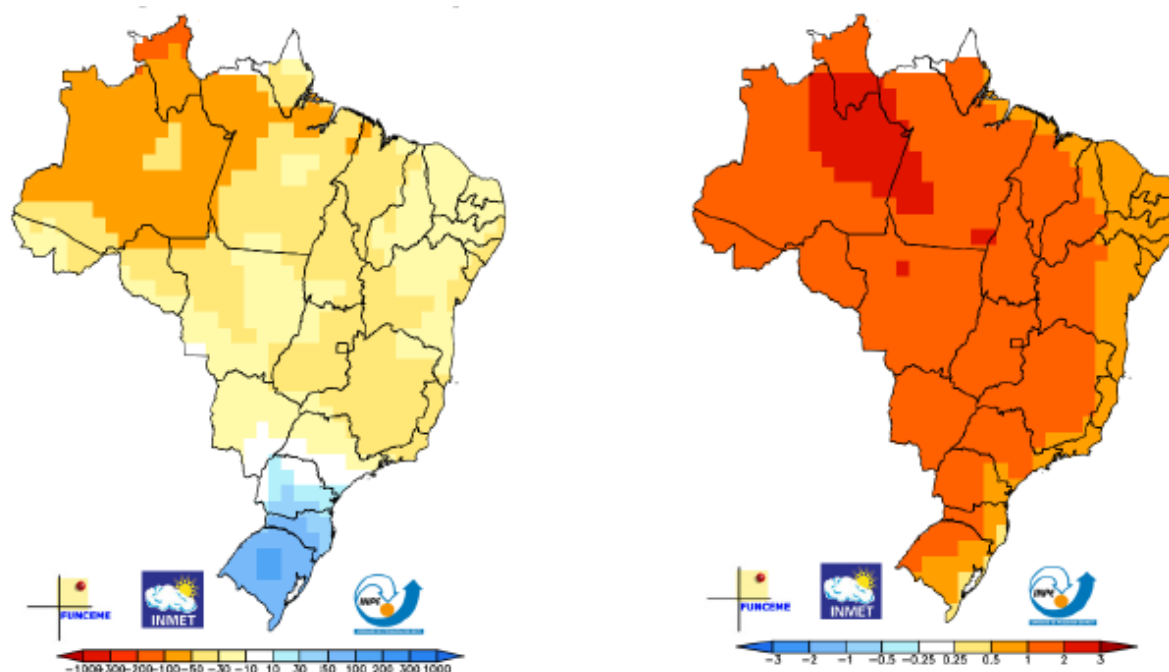
Weather Conditions

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) predict that rainfall and temperature will be above average in the south of Brazil in August, September, and October of 2026. 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 5 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, 2026.



Data Source: INMET Monthly Agri Climatological Report August 2026

The U.S. National Oceanic and Atmospheric Administration (NOAA) reports that the El Niño phenomenon continues to intensify and is expected to strengthen through the end of the year. NOAA estimates a 97 percent chance that the phenomenon will persist through May of 2027, with a 90 percent chance of a very strong El Niño through March of 2027. NOAA also predicts a 69% chance of an historic cycle with the strongest El Niño since 1950.

El Niño can directly affect poultry production in three main ways. First, and most significantly, it impacts grain availability and prices: rainfall discrepancies can affect grain quality, while feed industry stockpiling decisions influence feed availability and cost, both critical for producers. Second, it affects animals' thermal comfort, which can alter feed conversion rates, growth, and mortality. Third, it influences disease and logistics: higher humidity raises risks of infections, parasites, respiratory issues, and weakened immunity, while excessive rain can disrupt transportation.

In Brazil, El Niño's effects vary by region. In the south, where close to 60 percent of slaughter is concentrated, El Niño creates excessive rainfall, which can lead to increased sanitary problems, such as fungal diseases, and operational problems. In 2024, El Niño resulted in floods in the region, which eventually impacted a production facility in the region, leading to an outbreak of Newcastle Disease. For more on this case, please refer to Post's Poultry and Products Semi-Annual Report, BR [2025-0005](#).

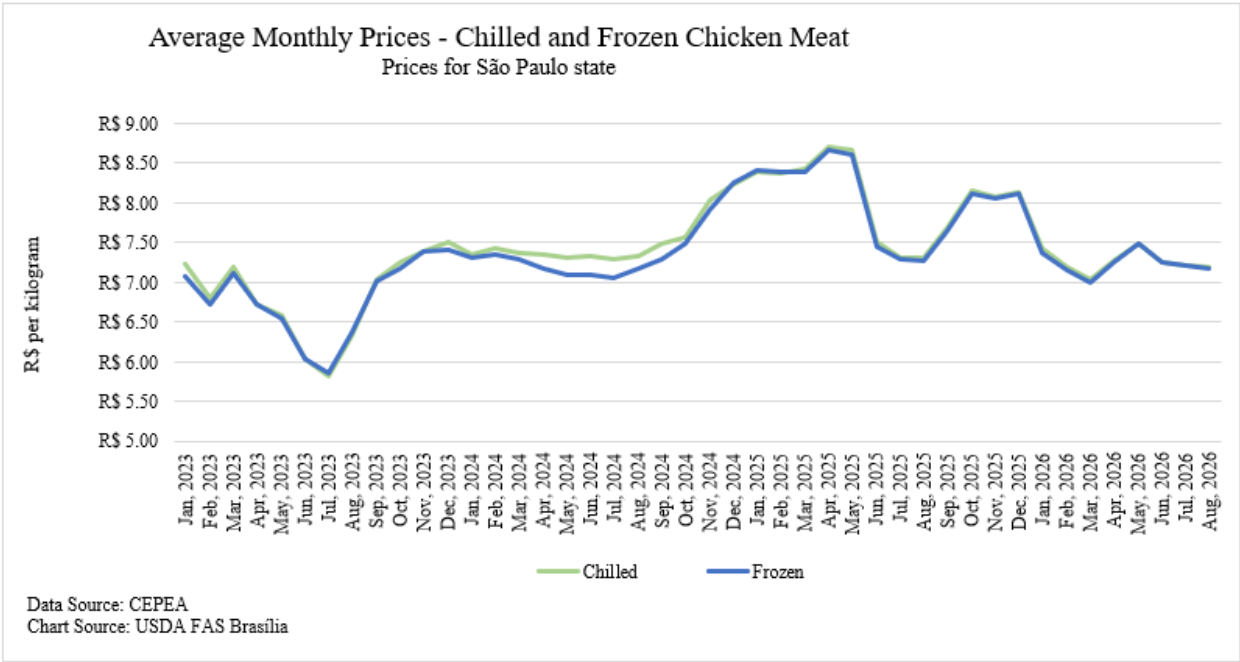
In the southeast and center-west regions of Brazil, where close to 34 percent of production is concentrated, the risks are associated with heat and rainfall irregularities, which can affect feed production and animal’s thermal balance.

Poultry producers continue to monitor weather conditions, as abrupt climate changes can lead to increased bird deaths and require increased electricity expenditures to protect the birds. Furthermore, weather changes could also impact feed availability as some of these weather phenomena have a direct impact on grain production.

1.3. Price and Profitability Outlook

Poultry prices are expected to stabilize in 2027 and continue their recovery from price declines in 2025. More information on the outbreak in section “1.5. Sanitary Status” of this report. The forecast is based on overall decreased input costs sustained by a reduction in feed costs, increased domestic demand due to rising prices for competing animal proteins, and strong external demand. The average price per kilogram of chilled chicken meat in the period of January to August was R\$7.19 (USD1.40), and frozen chicken was sold at an average price of R\$7.18 (USD1.40). The graph in Figure 6 shows the average monthly prices for chilled and frozen chicken since January 2023 and shows the effects of the HPAI case in a commercial plant, as well as a recovery in prices as markets reopened.

Figure 6
Average Monthly Prices – Chilled and Frozen Chicken Meat



Post estimates production will increase in 2026 and forecasts further expansion in 2027. 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 chickens.

1.4. Production Costs

1.4.1. Cost of Feed

For 2026, the National Union for Animal Feed Industry (Sindirações) forecasts 98.4 million tons of feed production. The Union is still assessing final feed production for 2025, but estimates 94.2 million tons of feed were produced that year. If confirmed, this represents a 4.4 percent annual increase.

The Union estimated 4.8 percent growth overall for poultry feed, reaching 47.5 million tons in 2026. For broilers, Sindirações estimates 2026 feed production at 39.8 million tons, representing a five percent increase from 2025. For layers, the union estimates the 2026 production at 7.7 million tons, a four percent increase from the previous year. At the time of this report's publication, Sindirações has not yet released feed production estimates for 2027.

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. Industry sources indicate there is idle capacity in the feed industry, last estimated at roughly 10 MMT, meaning production could ramp up if needed. Furthermore, contacts relay that as more corn is used for ethanol blending, feed industries are already evaluating other ingredients and commodities for feed use in the future.

As a major producer of both corn and soybean meal, Brazil has a competitive advantage when producing chicken for subsequent slaughter due to favorable costs of feed. For crop season 2026/2027, USDA forecasts record crops for both soybeans and corn.

Corn

The USDA World Agricultural Supply and Demand Estimates (WASDE), published on August 12, 2026, forecasts Brazil's corn production for MY 2026/27 at 139 MMT. Brazil is expected to remain the third-largest corn producer in the world, behind the United States and China.

Figure 7

Brazil – Corn Prices

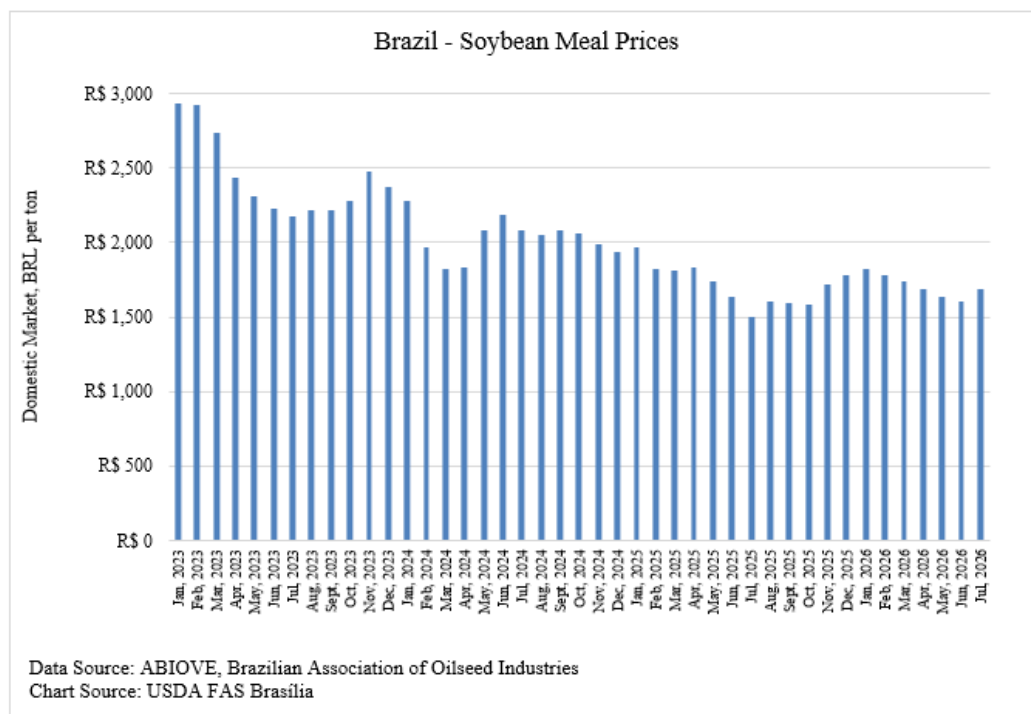


Soybean

As of August 12, the WASDE forecasts Brazil's soybean production at 186 MMT for MY 2026/27, a record-setting production level. Brazil remains the world's largest soybean producer. Post notes that although year-over-year expansion is projected to moderate, the increase in planted area remains the primary driver of record production, as yields may be constrained by higher production costs, elevated interest rates, and El Niño-related weather concerns. For more information on soybeans, please refer to [BR2026-0029](#).

Figure 8

Brazil – Soybean Meal Prices



Impact of Feed Costs on Production

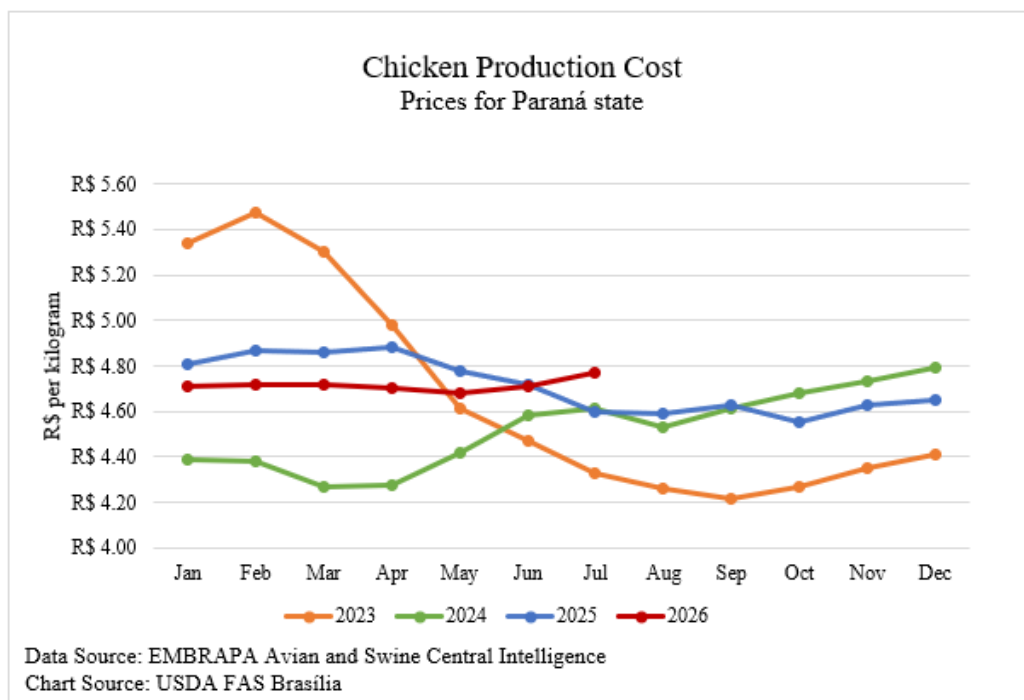
In July 2026, feed costs for chicken production were 1.35 percent higher than the previous year, constituting 62.5 percent of total production costs. For 2027, Post forecasts that record corn and soybean crops will continue to positively impact the poultry industry, lowering feed costs and making it 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. The table in Figure 9 shows Paraná producers experienced overall higher production costs per kilogram in July 2026 when compared to the previous year. In the month, production costs averaged R\$ 4.77 (USD 0.93) - see more details in Figure 10 Poultry Production Costs. For the remainder of 2026, Post forecasts production costs to remain relatively stable, as improvements are forecast in corn and soybean crops. International demand and the favorable exchange rate will also favor production, which is estimated to reach 16.3 MMT in 2027.

Figure 9

Chicken Production Cost for Paraná State



The Brazilian Company of Agricultural Research (EMBRAPA) compiles an index for poultry production costs, called *ICP Frango*. In July 2026, feed costs accounted for over 62 percent of total production costs in the state of Paraná. Other production costs include genetics investments, labor, electricity, bedding, heating, and transportation. Figure 10 shows that in July 2026, animal health costs rose the most year-over-year, up 35.7 percent, while capital costs were the only category to decline.

Figure 10*Poultry Production Costs*

Poultry Production Costs - July, 2026		
Item	Value difference compared to previous 12 months	Percentage of total
Feed	+1.35%	62.51%
Genetics	+15.07%	19.83%
Labor	+5.63%	4.68%
Animal Health	+35.70%	1.20%
Electric Energy/ Bed/ Heating	+6.71%	2.47%
Maintenance/ Insurance	0.00%	0.69%
Transportation	+7.68%	1.59%
Funrural - Assistance Fund for Rural Workers	+3.80%	0.17%
Others	+6.42%	0.24%
Depreciation	0.00%	2.59%
Capital Cost	-14.06%	4.02%
Total	+3.76%	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 2023 to July 2026. As shown in the table, the average prices of these products have remained relatively stable throughout the current year.

Figure 11*Costs for Paraná State*

Costs for Paraná state - R\$/kilogram													
	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Live Chicken	2023	5	4.98	4.91	4.86	4.77	4.54	4.4	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	4.97	5.13	5.02	4.96
	2026	4.62	4.72	4.59	4.62	4.69	4.75	4.74					
Soybean Meal	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	1.70	1.70	1.78	1.82
	2026	1.93	1.91	1.86	1.89	1.88	1.83	1.87					
Corn	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	1.02	1.02	1.04	1.07
	2026	1.08	1.02	1.05	1.06	1.06	1.02	1.03					

Data Sources: EMBRAPA Avian and Swine Central Intelligence and Paraná Secretariat of Agriculture and Food Supply - DERAL

Chart Source: USDA FAS Brasília

For 2027, Post forecasts Brazil will see two percent growth in production. Post contacts point to idle capacity, so producers are continuing to balance placement levels and global demand to determine production levels. The forecasts in this report assume the continuation of Brazil's sanitary status and any related policies as of September 9, 2026.

1.5. Sanitary Status

1.5.1. Avian Influenza

Brazil first reported a case of highly pathogenic avian influenza (HPAI) in wild birds to the World Organization for Animal Health (WOAH) on May 15, 2023, starting in Espírito Santo. Two years later, on May 15, 2025, the Ministry of Agriculture and Livestock confirmed the country's first commercial poultry outbreak, detected in a breeder facility for fertile egg production in Montenegro, Rio Grande do Sul. All culling and egg elimination was completed by May 18, 2025.

Immediately following the detection, Brazil notified WOAH and liaised with governments worldwide to give notice of the outbreak and remediation actions taken by the Brazilian government. 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 negotiated with Brazil's trading partners.

As of September 9, 2026, Brazil has confirmed 192 cases of HPAI spread across 12 states and the Federal District, including one case in a commercial plant, 16 in backyard flocks, and the rest in wild birds. Brazil is currently free of HPAI for commercial purposes. The map in Figure 12, prepared by MAPA, shows the locations (white with red border) where HPAI cases have been confirmed. Positive detections in commercial plants are shown by triangles, backyard cases by hexagons, and wild bird cases by circles. Suspected cases proven false by laboratory testing are marked in grey. There is currently only one active case, an infected wild bird detected in São Paulo state, which is marked in red. MAPA has prepared a complete public-facing [dashboard](#) to provide additional details for all HPAI cases.

For further information regarding HPAI in Brazil, the Brazilian government's response, and planned future actions, please refer to Post's previous Poultry and Products reports: Reports [BR2023-0022](#), [BR2024-0002](#), [BR2024-0028](#), [BR2025-0005](#) and [BR2025-0038](#). 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 9, 2026.



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

Most HPAI cases occurred near shorelines, which corresponds with the migratory routes of wild birds passing through Brazil. Industry and government officials 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 public. Biosafety is currently a top priority for the sector, with significant discourse and information exchanges occurring at industry events and conferences, all of which operate under rigid biosecurity protocols.

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. Brazil's most recent prior cases of NCD occurred in 2006, in backyard birds. Several contacts consider the 2024 incident an isolated case, likely triggered by hail damage that broke the poultry house roof, leading to the death of animals and creating conditions for the disease to spread. NCD tracking is available on the same MAPA dashboard: the Poultry Respiratory and Nervous Syndrome dashboard.

As of September 9, 2026, there are currently no cases of NDC in Brazil, either confirmed or under investigation. For more details on government measures during the outbreak, please consult Post's Poultry and Products Annual Report [BR2024-0028](#).

2. Consumption

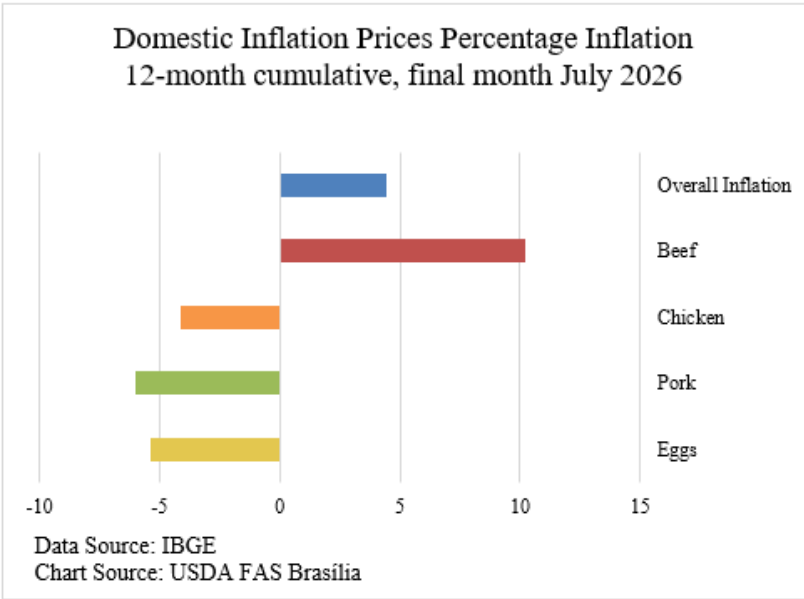
Post forecasts domestic chicken consumption in 2027 at 10.8 MMT RTC, growing one percent from the current year, which is estimated at 10.7 MMT RTC. Post anticipates that 66 percent of Brazilian chicken production will be consumed domestically in 2027.

The Brazilian Central Bank (BCB) forecasts sluggish economic performance in 2027. Domestic consumption may be boosted by social aid programs targeting needy populations and an increased minimum wage. In 2026, the Brazilian minimum wage was increased by 6.8 percent, with the government proposing an additional 7.4% percent increase in 2027.

In July 2026, the BCB reported a record rate of Brazilian household indebtedness, with 49.9 percent of annual household income already committed to paying debts like financing, personal and payroll-deducted loans, and credit card expenses. Other research shows that 81.7 million individuals are in default in Brazil. Higher levels of household debt impact consumption patterns, with the most significant impacts in the lower income households. The government did a nation-wide debt renegotiation program that ended in August of 2026. Contacts report that since Brazil legalized sports betting in 2018 and further ruled in 2023, the levels of family indebtedness have spiked. While these factors may negatively impact household purchasing power and thus consumption, the high costs of other animal protein sources, such as beef, will lead to an increase in consumption.

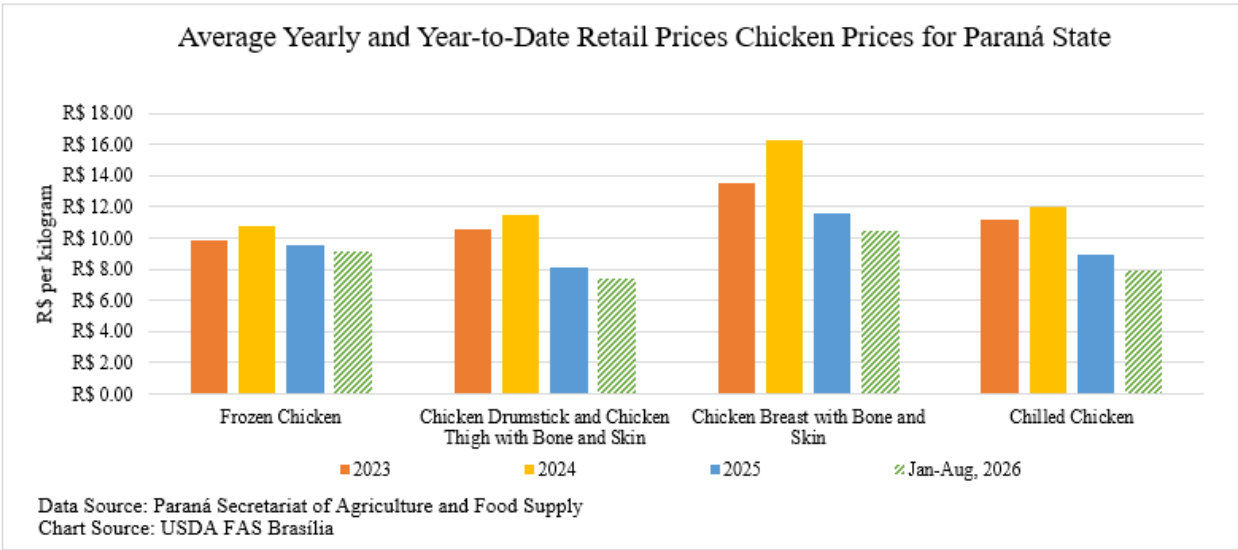
Although Brazilian consumers prefer beef, the relative affordability of chicken makes it Brazil's most widely consumed animal protein. As seen in Figure 13, inflation in the domestic retail market for chicken slightly increased by 0.91 percent in the past year, per official IBGE data.

Figure 13
Domestic Retail Prices Percentage Inflation



The state of Paraná serves as the reference point for chicken production in Brazil. The state’s Secretariat of Agriculture and Food 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 2026 decreased in every category when compared to previous years. From January to August 2026, prices further decreased in the state. Post forecasts a one percent increase in domestic consumption in 2027 as production levels are forecast up. Additionally, chicken meat competes with other animal protein sources: beef consumption is estimated down and pork consumption is forecasted one percent up in 2027. For more information on beef and pork production and consumption in Brazil, please refer to Post's Livestock Annual Report, [BR2026-0035](#).

3. Trade

3.1. Exports

Post forecasts Brazil will remain the world's largest chicken meat exporter in 2027, a position it has held without interruption since 2013. Chicken meat exports are forecast at 5.5 MMT RTC in 2027, a four percent increase from the 2026 estimate of 5.3 MMT RTC. Post forecasts exports will account for 34 percent of all production in Brazil in 2027.

This forecast is based on increased production; estimated exports for 2026, consistent foreign demand for 2027; 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.

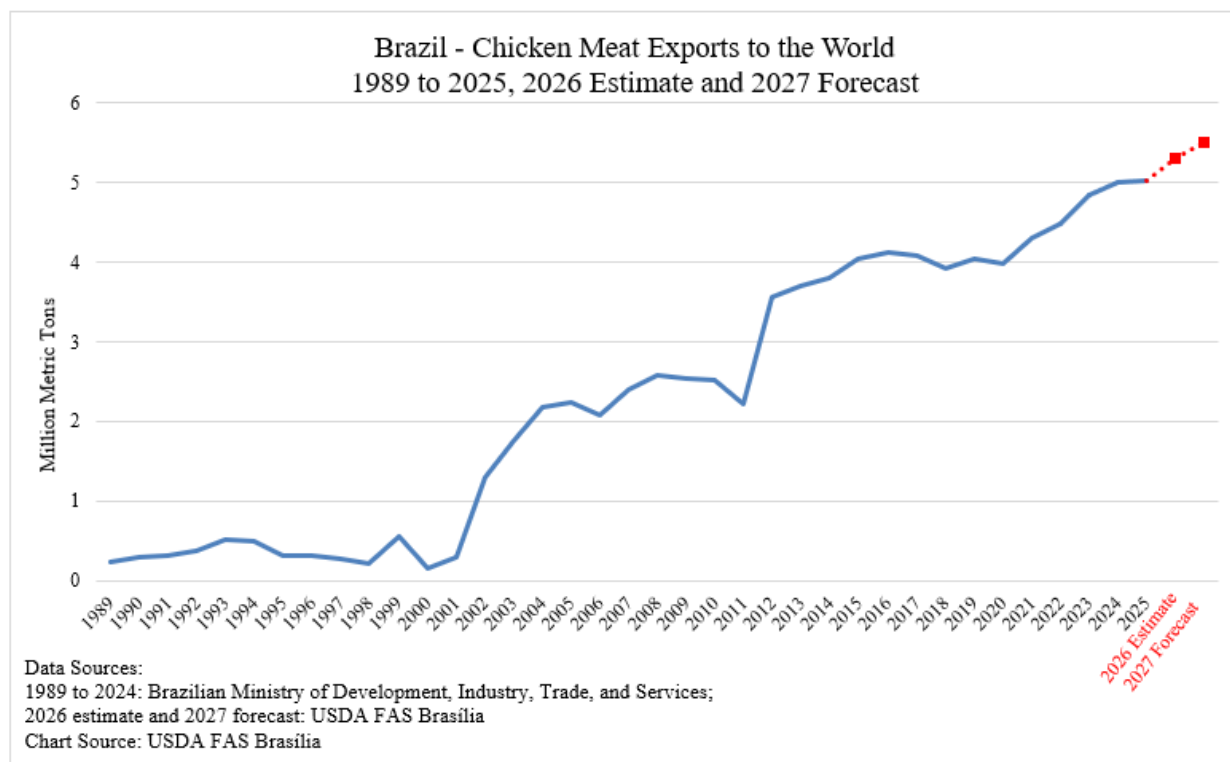
Note that Post and official USDA forecasts do not include chicken paws, but official Brazilian statistics do. Furthermore, Post and official USDA forecasts consider policy in place. For example, this assessment considers the EU market to be closed to Brazilian animal-origin products effective September 3, 2026.

Official Brazilian government data from the Ministry of Development, Industry, Trade, and Services (MDIC) indicates Brazil exported 3.7 MMT of chicken meat (including paws) from January to August of 2026, a 14.6 percent increase over the same period last year, when it exported 3.2 MMT.

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 2027 forecast considers consistent external demand, new market openings, increased domestic consumption, and relatively 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 is expected to be responsible for 34.8 percent of global chicken meat exports in 2026, with the next two largest exporters, the United States and the EU, accounting for a combined 32.2 percent of global exports.

HPAI Trade Implications

Brazil is currently considered free from HPAI in commercial plants. Following the May 2025 commercial plant case, several trading partners imposed restrictions at different levels: national, state, municipality or zone level. For some countries, the level of restrictions imposed varied depending on the product, varying between municipal to state-level restrictions. Total trade was reestablished on December 26, 2025, when Canada lifted its restrictions, the final country to do so. Trade estimated for 2026 and forecast for the outyear does not consider any trade restrictions related to HPAI.

Regionalization

MAPA continues to negotiate regionalization agreements with major trading partners to mitigate potential restrictions in case of outbreaks of HPAI or NCD in commercial plants. 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- or municipality-level. A public list of countries with which Brazil has secured such agreements, and their terms, is not available. Since some health certificates don't specify HPAI or NCD, importing countries must decide on a case-by-case basis whether suspension is warranted, weighing internal food security needs. Some markets demonstrate regulatory flexibility and will regionalize imports from Brazil to ensure the availability of a low-cost, preferred animal protein for their consumers.

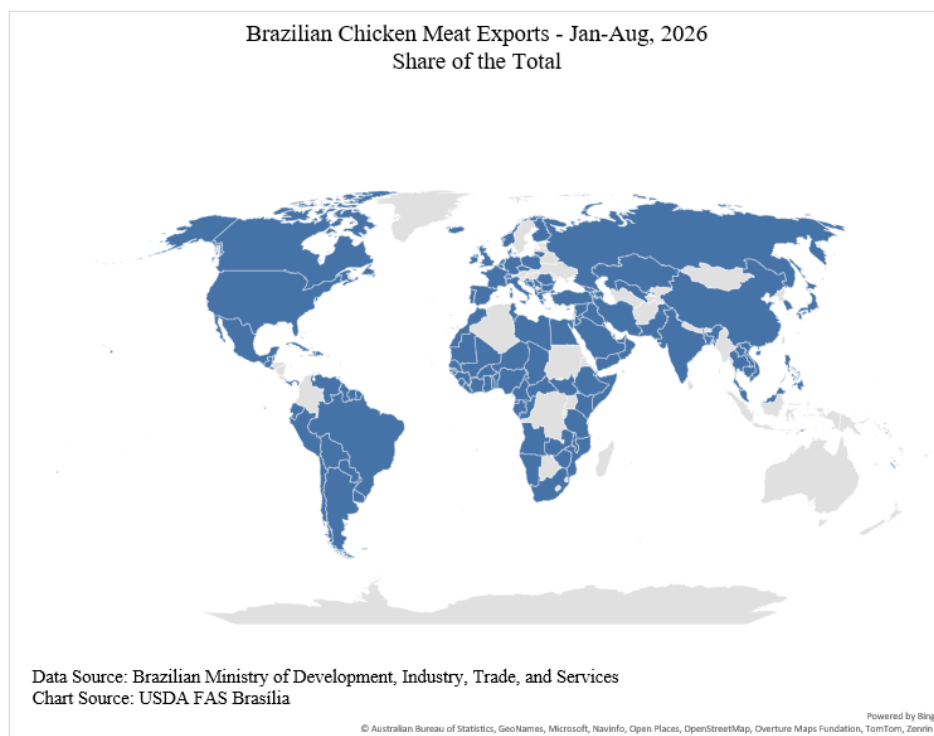
Trading Partners

Unlike other animal proteins with more concentration of export markets, Brazil's chicken meat export destinations are relatively diversified. From January to August of 2026, Brazil exported 3.7 MMT of chicken meat and chicken products – with paws - to 161 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 2026

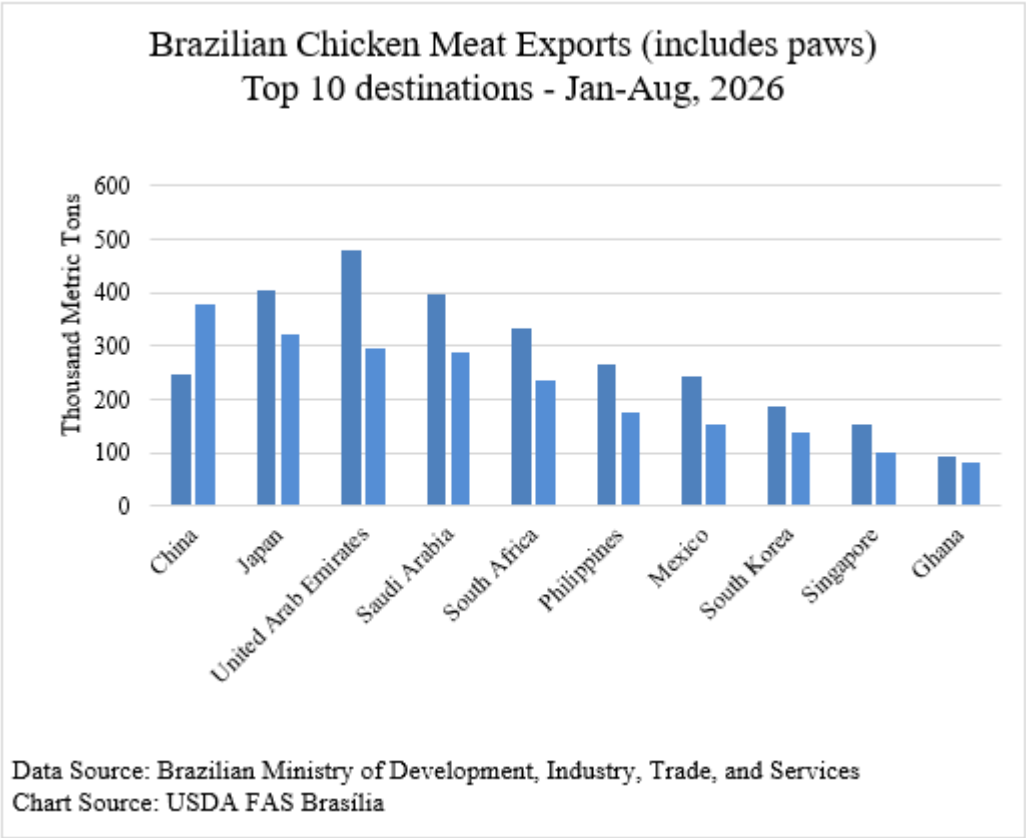


From January to August of 2026, Brazil’s top five chicken meat export markets were China, Japan, the United Arab Emirates, Saudi Arabia, and South Africa. Brazil exported 1.32 MMT to these countries during the period, accounting for 41.4 percent of all exports.

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

Figure 17

Brazilian Chicken Meat Exports – Share of the Total – Top 10 destinations, Jan-Aug 2026



People’s Republic of China (PRC)

China has remained Brazil’s top chicken meat export market since 2019, although it was temporarily dislodged from the top position in 2025 due to trade restrictions relating to the HPAI outbreak in Brazil. From January to August of 2026, over ten percent of all Brazilian chicken meat exports went to China.

Figure 18 shows monthly exports since 2023. From January to August of 2026, Brazilian exports to China were 67.2 percent higher than in the same period in 2025.

Figure 18

Brazilian Monthly Chicken Meat Exports to China



As seen from the graph, exports to China plummeted starting in June of 2025, then restarted as soon as restrictions were lifted. A sharp decrease is also seen in August 2024, when Brazil self-imposed export restrictions after NCD was detected in Rio Grande do Sul. 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. The prohibition was lifted on January 20, 2026.

Brazil currently has 82 plants authorized to export poultry and poultry products to China, out of which one is suspended. Of the plants authorized to ship to China, 30 are in Paraná; 15 in Santa Catarina; 12 are in Rio Grande do Sul; eight are in Minas Gerais; six are in Mato Grosso do Sul; and the remainder in other states. Despite negotiations in motion, as of September 9, 2026, Brazil has not yet reached an agreement to regionalize exports to guard against the potential recurrence of diseases such as HPAI and NCD. Brazil does not publish its export certificates for human consumption publicly.

According to USDA FAS Beijing Report [CH2026-0087](#), the China is forecast to increase domestic production in 2027 by 5.5 percent compared to the 2026 estimate, driven primarily by continued growth in white broiler production. Post Beijing also forecasts Chinese chicken meat imports to decline in 2027, with Brazil remaining the leading supplier due to its highly competitive industry, large scale, established trade relationships, and broad product offering.

Japan

Japan was the second-largest destination for Brazilian chicken meat exports from January to August, 2026, with close to 322,232 tons exported, representing nearly a 18.7 percent increase from the previous year. Over 140 Brazilian plants authorized to export poultry meat and products to Japan. For 2027, Post Tokyo forecasts flat imports for 2027 overall – please see Report [JA2026-0046](#). Brazil was Japan's second largest supplier in the first half of 2026.

Halal Markets

Brazil continues to focus on growing exports to halal markets, such as the United Arab Emirates and Saudi Arabia, who have been long-term customers for Brazil. Brazil is currently the largest halal chicken meat producer in the world. Halal production in Brazil follows traceability criteria and sanitary requirements in partnership with certifying and religious authorities.

In the latest State of the Global Islamic Economy Report 2025/26, prepared by the Organization for Islamic Cooperation (OIC) and published in June 2026, Brazil was ranked as the largest exporter of halal food to OIC member states. Brazil exported USD 33.3 billion in food and beverages. By comparison, India was the second-largest halal exporter, with USD 21.3 billion, while the United States ranked fifth with USD 13.5 billion. Within Brazil's halal foods exports, animal proteins are the main drivers of trade.

Post forecasts exports to halal-observant countries will be a significant driver of export growth in 2027.

Middle East

Brazil has maintained a strong trade partnership with Middle Eastern countries for at least 50 years. In February 2026, the resurgence of military conflict in the region disrupted Brazilian trade, with port and shipping channel closures, higher insurance and routing costs, and limited storage reducing Brazilian chicken meat exports by 7.2 percent. Despite these challenges, ABPA notes that Brazil was able to maintain most of its exports to the region using alternative routes, such as the Suez Canal thus far in 2026. To mitigate part of these challenges over time, some Brazilian companies have invested in local production in the region over time. Currently, the company MBRF operates three chicken meat processing plants - two located in Saudi Arabia, and one in the United Arab Emirates. Meanwhile, JBS, the world's largest poultry producer, recently announced a USD 150 million investment in Oman to establish a multiprotein platform in partnership with Oman Food Capital. The plant will process 300,000 tons per year, including chicken, sheep meat, and beef, some of which exported from Brazil and some raised locally.

United Arab Emirates

The United Arab Emirates (UAE) was the third-largest destination for Brazilian chicken meat exports from January to August 2026, reaching close to 297,488 tons, a 5.7 percent decrease compared to the

same period the previous year. Brazil was the UAE's largest supplier from January to May of 2026, based on the latest data available.

Brazil currently has 127 plants authorized to export poultry meat and products to the UAE, although one is currently suspended. MBRF operates a plant in Kezad that recently expanded its capacity to 90,000 tons of chicken meat per year and also supplies 70,000 tons of chicken meat and beef per month to complement local production. JBS, in turn, has a processing plant in Ras Al Khaimah.

Saudi Arabia

Saudi Arabia was the fourth-largest destination for Brazilian chicken meat exports from January to August, 2026, reaching close to 288,680 tons, a 10.8 percent increase from the same period the previous year. Brazil currently has 19 plants authorized to export poultry and products to Saudi Arabia. There are five additional plants that are currently suspended. Brazil was Saudi Arabia's largest supplier from January to May of 2026, based on the latest data available. Post forecasts exports to Saudi Arabia will increase in 2027.

In October 2025, MBRF, in a joint venture with the Saudi Investment Fund, established Sadia Halal, a company valued at USD 2.07 billion, which oversees the plants in Dammam and in Al Jubail. MBRF is also investing USD 160 million in a plant in Jeddah to process 40,000 tons per year. JBS operates two plants in the UAE, located in Damman and Jeddah. The Jeddah plant is under expansion to reach 30,000 tons production per year.

Mexico

Mexico was the seventh-largest destination for Brazilian chicken meat exports from January to August of 2026, with a little over 94,329 tons exported, a 9.2 percent increase from the same period the previous year. Brazil currently has 88 plants authorized to export poultry meat and products to Mexico, with four currently suspended.

On December 31, 2025, Mexico extended the Presidential Anti-Inflation Decree through December 31, 2026. This decree provides tariff exemptions for some agricultural products, including chicken meat. Increases in the period may be attributed to tax exemption. For more information on the Mexican anti-inflation decree, please refer to Post Mexico City Report [MX2026-0003](#).

European Union: Free Trade Agreement with Mercosur Overshadowed by the Antimicrobial Resistance Regulation

On January 17, 2026, the European Union (EU) and Mercosur (Argentina, Brazil, Paraguay, and Uruguay) signed the EU-Mercosur free trade agreement (FTA), following negotiations started in 1999. The agreement went into force provisionally as of May 1, 2026, as Brazil concluded its ratification.

The agreement includes limited tariff-free quotas for Mercosur products, and once those quotas are reached, current tariffs are reimposed. Moreover, if there are sudden, sharp rises in imports, the EU can impose measures to limit them.

Currently, the Brazilian poultry sector has various quotas for access to the European Union. In the case of chicken meat, Brazil can export 15,050 tons at zero tariff, while volumes exceeding this quota are subject to a tariff of €1,024 per ton. Under the agreement, Brazil, together with other Mercosur countries, will have an annual export quota of 180,000 tons at zero tariff. This quota will start at a lower level in the first year and will be increased in equal annual increments until reaching the full amount in the sixth year. Brazilian chicken meat exports outside the agreement's quota will remain subject to the current tariff rules.

On May 12, the EU Commission excluded Brazil from its list of countries deemed to be in compliance with EU restrictions on antimicrobial use in food-producing animals. This exclusion means that effective September 3, 2026, Brazil will no longer be eligible to export beef, poultry, and other animal-origin products to the EU. EU legislation bans imports of animals and animal products originating from production systems that use antimicrobials to promote growth or increase productivity, or use substances reserved for human medical treatments. Brazil reportedly did not present the information requested by the EU Commission in time. Brazilian industry contacts view this decision as a technical barrier to trade and EU protectionism.

While the Brazilian government continues to engage with the EU Commission, producers have expedited shipments before the ban takes effect. From January to July, 2026, Brazil exported close to 125,700 MT of chicken meat to the EU, a 49.9 percent increase from the same period last year. Post contacts indicated the intention is to build inventory in the EU while negotiations take place.

Given the shorter life cycle of chickens, in order for Brazil to demonstrate full traceability and compliance with the AMR legislation, some contacts note that such animals could potentially be available within 6 months. The other Mercosur countries, Argentina, Paraguay, and Uruguay, were deemed compliant by the EU Commission and were not included in the banned list.

Although the EU is a relatively small market for Brazilian chicken meat, representing only 3.9 percent of total chicken meat exports from January to July of 2026, it is considered a “display” market, given its high regulatory standards. Losing access to this market could therefore impact global perceptions of Brazilian chicken meat and undermine efforts to cultivate the EU market as a top destination for higher value-added Brazilian products. Forecasts in this report are based on expectations the EU market will be closed to Brazilian poultry and poultry products as of September 3, 2026.

The European Commission carried out an audit in Brazil from August 24 to September 4, 2026, to assess compliance with EU AMR legislation. This audit only concerned poultry and honey. The results of the audit usually take a long time, ranging from weeks to months. The Brazilian authorities will receive a draft of the results before an official publication of the audit. If the results of the audit are positive, after its publication the Commission will then need approval of the Member States before Brazil is returned to

the list of authorized countries. The next voting sessions in which this approval could take place are October 20-21, and November 16-17, 2026.

Exports to the European Union are normally facilitated via electronic health certificates, a process that secures speedy analysis of necessary import-export documents and certifications. Brazil has over 109 plants authorized to export poultry meat and products to the European Union, although the market is effectively closed as of September 3, 2026.

For detailed information and analysis on the Mercosur- European Union free trade agreement, please consult Post Brasília Report [BR2026-0009](#). For information on the separate free trade agreement between Mercosur and the European Free Trade Association (EFTA) signed on September, 2025, please consult Post's Poultry Annual Report [BR2025-0038](#).

Diversifying trading partners

New Markets Opening

Brazil's Ministry of Agriculture and Livestock and Ministry of External Affairs continue to pursue new market openings and to expand the range of exportable products to existing markets.

From January to July, 2026, Brazil opened 139 new markets in several countries, of which 12 were related to poultry and poultry products, including poultry meat, offal, poultry meal, poultry oil, egg and egg products, and day-old chicks. These new market openings reflect MAPA's targeted effort to bolster global demand for Brazilian poultry and poultry products.

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 lacked a quorum of appellate judges to review cases.

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 can potentially facilitate implementation of the WTO decision regarding chicken meat. As of August 2026, there are no updates to share on the case. Post will continue to monitor the case.

3.2. Imports

Post forecasts chicken meat imports for 2027 at 5,000 MT. From January to August, 2026, Brazil imported a little over 2,000 MT in frozen chicken cuts and edible offal, and prepared or preserved chicken meat, meat offal or blood, originating from Argentina and Chile. Trade data indicates that 23 MT of frozen chicken cuts and edible offal were imported from the United States. This value is almost certainly an error, as the United States does not have sanitary equivalence for exports of fresh or frozen poultry and poultry products to Brazil, and is therefore prohibited from exporting such exports to the Brazilian market.

Annex 1



Attachments:

No Attachments