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Prepared By: Jadon Marianetti and FAS China Staff

Approved By: Eric Mullis

Report Highlights:

China's chicken meat production and consumption will grow modestly in 2026, though market saturation from 2025 is likely to persist for some time.. Imports remain limited by HPAI-related restrictions on Brazil and parts of the United States, as well as retaliatory tariffs. U.S. chicken paws continue to hold a niche market, though growth is constrained by inspection delays and other non-tariff measures.

EXECUTIVE SUMMARY

FAS China provides this analysis and reporting as a service to the U.S. agricultural community, and to our farmers, ranchers, rural communities, and agribusiness operations in support of a worldwide agricultural information system and a level playing field for U.S. agriculture.

The forecasts and revised estimates provided in this report are issued by FAS China and are not official USDA data.

Production

Post forecasts 2026 chicken meat production to rise slightly from 2025 as large vertically integrated white broiler producers continue expanding capacity despite persistent low margins. Post revised upward its 2025 chicken meat production estimate as higher-than-anticipated supply in the first half of the year reflects producers' optimistic expectations for a rapid recovery in consumer demand.

Consumption

Post forecasts chicken meat consumption in 2026 to grow modestly, primarily led by white broilers. Chicken meat's price advantage over pork and beef, along with continued demand from quick-service restaurants and institutional catering, will encourage the consumption growth for white broiler meat. Higher costs could limit demand for yellow broiler meat.

Trade

Post forecasts China's chicken meat imports to decline in 2026 compared to 2025. Although demand from foodservice and processing could remain steady, constraints on major suppliers will continue to limit total import volumes. Post estimates China's chicken meat imports in 2025 to remain unchanged from the previous forecast, with total imports expected to fall from 2024 levels.

Chicken Paws

Separate from chicken meat trade, Post expects demand for U.S. chicken paws to remain stable in 2026. Large U.S. paws retain a competitive niche in China's snack food market, though import volumes may fluctuate due to non-tariff barriers including HPAI suspensions, heightened inspections, and tariff policy uncertainty.

PRODUCTION

Table 1. China: Production, Supply, and Distribution for Chicken Meat

Meat, Chicken	2024		2025		2026	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
China	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks (1,000 MT)	0	0	0	0	0	0
Production (1,000 MT)	15,350	15,350	15,500	16,200	0	16,700
Total Imports (1,000 MT)	477	477	430	430	0	400
Total Supply (1,000 MT)	15,827	15,827	15,930	16,630	0	17,100
Total Exports (1,000 MT)	770	770	800	950	0	1,100
Human Consumption (1,000 MT)	15,057	15,057	15,130	15,680	0	16,000
Other Use, Losses (1,000 MT)	0	0	0	0	0	0
Total Dom. Consumption (1,000 MT)	15,057	15,057	15,130	15,680	0	16,000
Total Use (1,000 MT)	15,827	15,827	15,930	16,630	0	17,100
Ending Stocks (1,000 MT)	0	0	0	0	0	0
Total Distribution (1,000 MT)	15,827	15,827	15,930	16,630	0	17,100
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Note: Chicken paws (HS 0207.14.22) are excluded from PSD calculations and trade numbers.
Note: Not official USDA data.

Chicken Production in 2026 to Grow Slightly

Post forecasts China's 2026 chicken production to grow slightly but with a slower growth rate than 2025. White broilers and hybrid broilers will continue to drive the growth, while projected yellow broiler production will remain stable. According to the latest industry data, white broilers account for roughly 70 percent of total chicken meat production, compared to 17–20 percent for yellow broilers and 8–10 percent for hybrid broilers. About five years ago, white broilers made up only around 50 percent of production. This ongoing shift toward white and hybrid broilers is expected to sustain moderate production gains in 2026.

White Broiler Production in 2026 to Increase Slightly

Post forecasts China's white broiler production in 2026 to increase slightly from 2025. Vertically integrated companies that dominate the relatively consolidated white broiler sector will drive this growth. Most integrated companies reported higher profits in the first quarter of 2025 despite falling chicken prices (see Chart 1), positioning them to maintain moderate expansion in 2026. Industry reports also indicate that several companies expanded processed product lines in 2025. Shifts in consumption patterns, with chicken gaining a larger share of total protein intake, could also support production growth from white broilers.

However, Post forecasts production growth will remain limited. Standalone broiler farms, who experienced periodic losses in 2025 due to low chicken prices, will remain cautious about expansion. In addition, ongoing restrictions on U.S. and New Zealand grandparent stock imports due to highly pathogenic avian influenza (HPAI) restrictions have constrained replacement. While domestic breeding lines have gained market share, they have not fully replaced imported genetics. In the first half of 2025, most imported grandparent stock came from France. Continued reliance on limited sources may restrict grandparent replacement and cap production growth in 2026.

Yellow Broiler Production in 2026 to Remain Stable

Post forecasts China's yellow broiler production in 2026 to remain largely unchanged from 2025. Market conditions (see Consumption Section) may force continued exits among small- and medium-sized producers, but industry sources expect leading companies to modestly increase output through vertically integrated operations. Their scale and efficiency will help offset losses from smaller farms, allowing overall production to remain stable despite potential price pressures. Leading companies managed to expand production and stay profitable in the first quarter of 2025, relying on a mix of in-house breeding and breeding from contracted farms to spread risks and stabilize margins even as yellow chicken prices declined.

However, with consumer demand showing little sign of growth (see Consumption Section) and prices already under pressure, industry sources expect leading companies to have modest production increases in 2026 rather than pursue aggressive expansion. Compared to white broiler companies that have built extensive processed and ready-to-eat product lines, yellow broiler integrators remain focused on live bird and fresh chicken sales, leaving them more exposed to market fluctuations and limiting their ability to expand rapidly.

Hybrid Broiler Production in 2026 to Continue Growing

Post forecasts China's 2026 hybrid broiler production to continue growing, anchored by their cost and production cycle advantages over pure yellow broilers. This hybrid results from crossing a white broiler male with a layer female and has proven to mature rapidly while consuming less feed. The faster turnover and lower input costs make it a compelling choice for producers targeting price-sensitive customers. Additionally, the 2025 approval of new hybrid breeds bolstered industry confidence.

Chicken Meat Production in 2025 Revised Up

Post revised upward its 2025 chicken meat production estimate as higher-than-anticipated supply in the first half of the year reflects producers' optimistic expectations for a rapid recovery in consumer demand. Sources indicate that output increased across white broilers, yellow broilers, and hybrid broilers, supported by abundant upstream capacity from high grandparent and parent stock inventories carried over from 2024. Shifts in consumption patterns toward chicken also contributed to higher output. Data from the National Bureau of Statistics confirm these trends, reporting an over seven percent year-on-year increase in poultry meat production during the first half of 2025.

CONSUMPTION

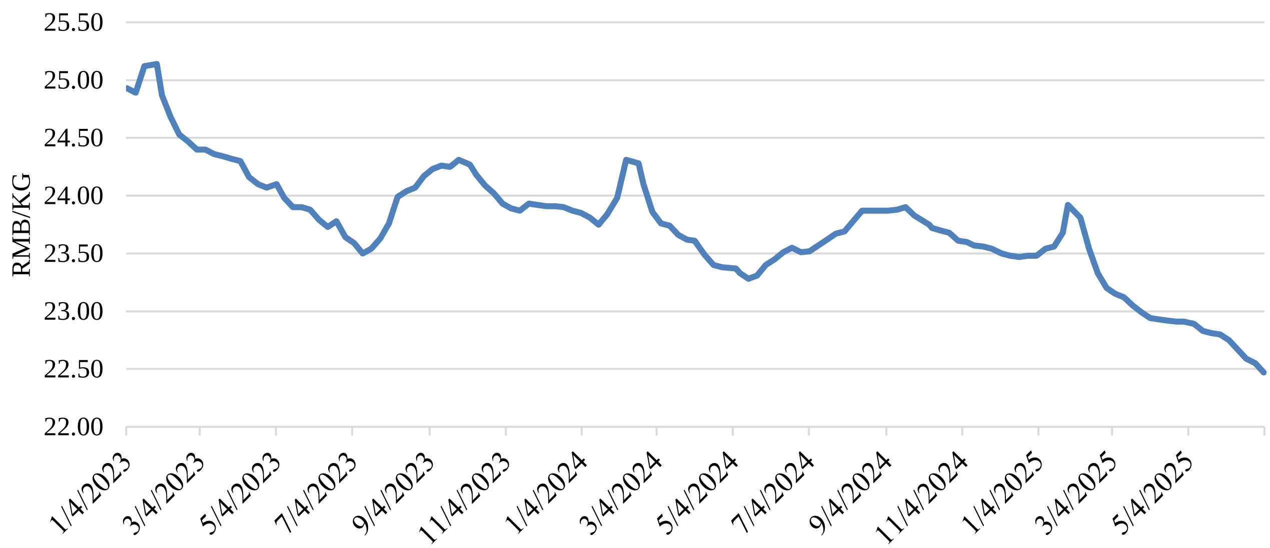
Chicken Consumption in 2026 to Continue Growth

Post forecasts that China's 2026 chicken meat consumption will continue to grow, primarily led by white broilers. Three factors underpin this trend. First, chicken meat remains a relatively low-cost animal protein. In an uncertain economic environment, its price advantage - particularly for white broilers and hybrid broilers - encourages households and the foodservice sector to substitute chicken for higher-priced meats. Second, institutional catering, including schools and workplace cafeterias, provides stable demand for white broiler meat. These channels are highly price-sensitive and account for a significant share of overall consumption. Finally, younger consumers and fitness-oriented groups are increasingly seeking high-protein, low-fat options, driving demand for fried chicken products and chicken breast meat made from white broilers in fast food restaurants and retail food segments. In contrast, yellow broiler consumption, which is concentrated in premium dining settings, is unlikely to expand amid slower economic growth due to its higher price point.

Chicken Consumption in 2025 Revised Upward

Post raised its estimate for China's chicken meat consumption in 2025, mainly due to recovering demand for white broilers in institutional catering and fast-food restaurant channels. Consumption grew modestly during the year. However, supply expanded at a faster pace. Driven by the release of high grandparent stock inventories and continued capacity expansion by integrated producers, broiler slaughter volumes rose significantly, creating ample market supply. Chicken meat prices continue to decline in 2025 as supply growth exceeds demand (see Chart 1).

Chart 1. China: National Average Chicken Meat Price[1]



Source: MARA

[1] The chicken price here refers to the average chicken price collected by MARA from monitored traditional markets across China.

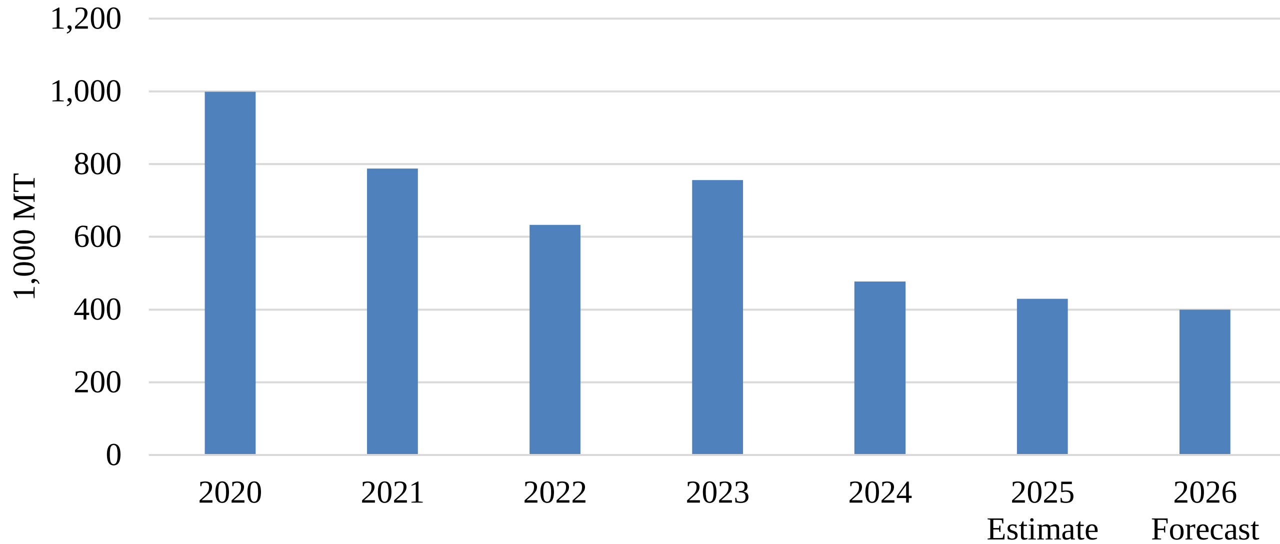
TRADE

Imports

Chicken Meat Imports in 2026 to Decline

Post forecasts China's chicken meat imports to decline in 2026 compared to 2025 (see Chart 2). Although demand from foodservice and processing could remain steady, constraints on major suppliers will continue to limit total import volumes.

Chart 2. China: Imports[2] of Chicken Products

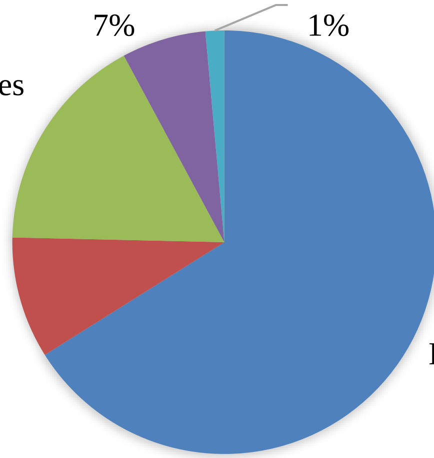


Source: USDA Official Data and Post Estimate and Forecast

China's primary chicken meat suppliers are Brazil, Thailand, the United States, and Russia, with Brazil traditionally accounting for more than half of total imports (see Chart 3). In May 2025, China's Ministry of Agriculture and Rural Affairs (MARA) and the General Administration of Customs of China (GACC) suspended poultry imports from Brazil following detections of HPAI. As of August 2025, this restriction had not been lifted.

[2] In this report, unless otherwise specified, chicken imports and exports refer to the following HS codes: 020711, 020712, 020713, 020714, and 160232.

Chart 3. China: Imports of Chicken Products by Origin (Jan – Jun 2025)



Source: Trade Data Monitor, LLC

As of August 2025, China's HPAI-related restrictions remain in place on U.S. poultry meat, poultry meat products, and live poultry for the majority of U.S. states. GACC prohibits raw poultry imports from facilities in areas situated in or derived from birds processed or slaughtered in areas where there has been a positive detection of HPAI. GACC, however, has not followed a previously signed HPAI protocol that would release HPAI restrictions on states after 90 days resulting in numerous states remaining under indefinite restrictions. If the Brazilian suspension remains in place and U.S. exports continue to face HPAI-related limits and tariff uncertainties, alternative suppliers such as Thailand and Russia — which have limited capacity and few approved establishments —are not likely to be able to fill the gap.

2025 Chicken Meat Import Estimate Unchanged

Post estimates China's chicken meat imports in 2025 to remain unchanged from the previous forecast, with total imports expected to fall from 2024 levels. Trade data indicate that imports rose year-over-year during the first half of 2025. Although domestic chicken prices declined, imported chicken continued to hold a cost advantage, particularly for processors and mid- to lower-end foodservice channels. However, as mentioned above, in May 2025, MARA and GACC suspended poultry imports from Brazil following detections of HPAI. Most U.S. states remain under HPAI-related export restrictions, limiting their frozen chicken export eligibility, while tariff uncertainties further constrain U.S. shipments. At the same time, China imposed new restrictions on countries with emerging outbreaks, including Puerto Rico (January 26, 2025), Bosnia and Herzegovina and Madagascar (February 21, 2025), and Belgium (March 5, 2025). However, these suppliers account for minimal trade volumes and have little impact on total imports.

China reinstated poultry export eligibility for several countries in the first seven months of 2025, but the resulting volumes are too small to offset the supply gaps from Brazil and the United States. According to GACC announcements, Argentina regained market access on March 17, 2025, only to lose it again in

August 2025 following a new HPAI outbreak, and China lifted Saudi Arabia's ban lifted on July 18, 2025.

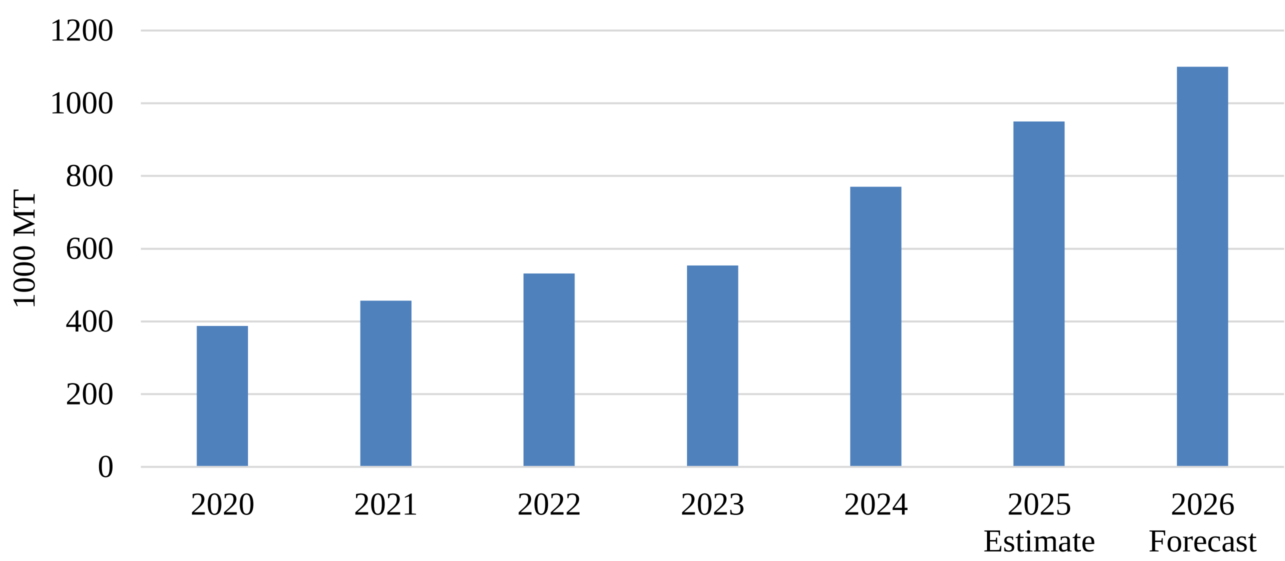
Overall, despite the year-over-year increase in imports during the first half of the year, the supply shortfall caused by the suspension of Brazilian shipments will increasingly weigh on imports during the second half of 2025. Additional supply from reinstated countries remains limited, and other key suppliers such as Thailand and Russia lack sufficient capacity and approved establishments to fill the gap. Post therefore maintains its 2025 full-year import estimate unchanged and expects total imports to decline from 2024 levels.

Exports

China's Chicken Meat Exports in 2026 to Continue Growing

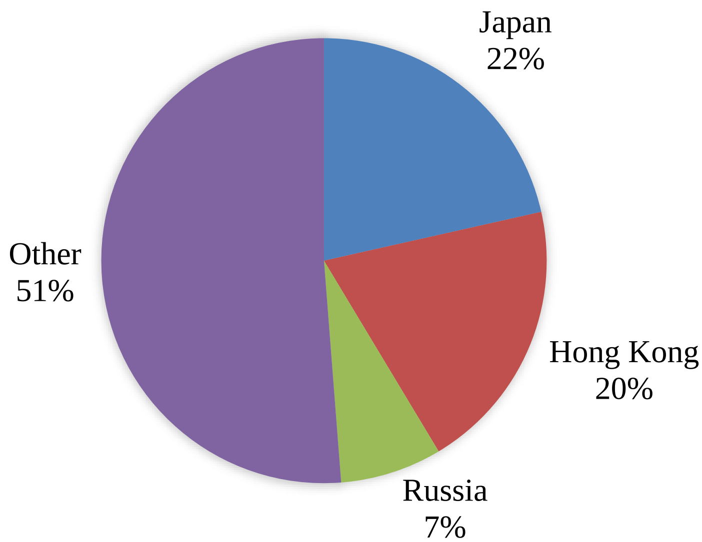
Post forecasts China's chicken meat exports to continue growing in 2026 (see Chart 4). Chinese chicken products retain a price advantage, and processed products meet the food safety and quality requirements of major importing markets. While Japan and Hong Kong will remain China's primary export markets (see Chart 5), much of the growth will come from Russia, Malaysia, and other Southeast Asian countries, as well as the European Union and the United Kingdom. Strong demand for competitively priced chicken and limited alternative supplies will help boost exports to Russia. China has also made inroads into the Middle East and Africa, with shipments to several African countries (e.g., the United Arab Emirates, Iraq, and Libya) increasing several-fold in the first half of 2025 compared to the limited exports in 2024.

Chart 4. China: Exports of Chicken Products



Source: USDA Official Data and Post Estimate and Forecast

Chart 5. China: Exports of Chicken Products by Destination (Jan – Jun 2025)



Source: Trade Data Monitor, LLC

2025 Chicken Meat Exports Revised Up

Post raised its 2025 chicken export estimate higher. Chinese poultry companies are actively driving export growth and have made inroads into several emerging markets. China's chicken exports have already grown by about 31 percent in the first half of 2025 compared to the same period in 2024.

CHICKEN PAWS

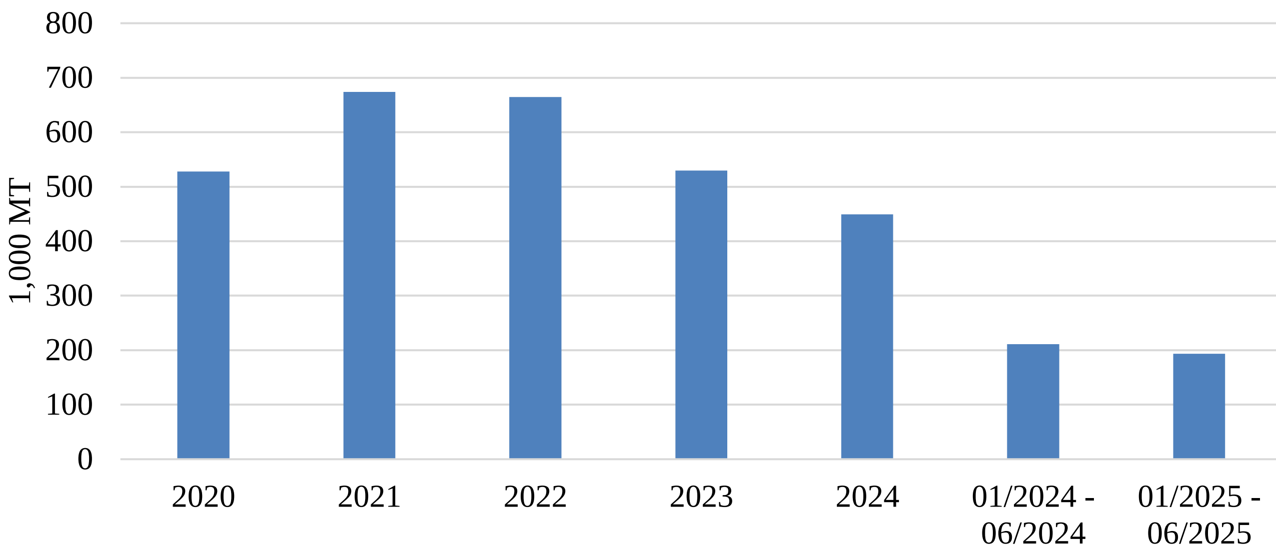
Chicken Paw Imports in 2026 to Decline

Post forecasts China's chicken paw imports to decline in 2026, even as domestic demand remains strong. Foodservice, snack food, and ready-to-eat processing channels continue to favor large, high-quality paws, but restricted imports are expected to constrain supply. Domestic production of white broilers will increase the availability of locally sourced paws, but their size and quality remain below that of imported products. Shipments from U.S. states affected by HPAI remain restricted, and Chinese customs inspections have tightened, leading to occasional rejections. Brazil also remains under export restrictions, while Thailand and Russia have limited approved facilities, leaving them unable to compensate for reduced U.S. and Brazilian supply.

Frozen Paws

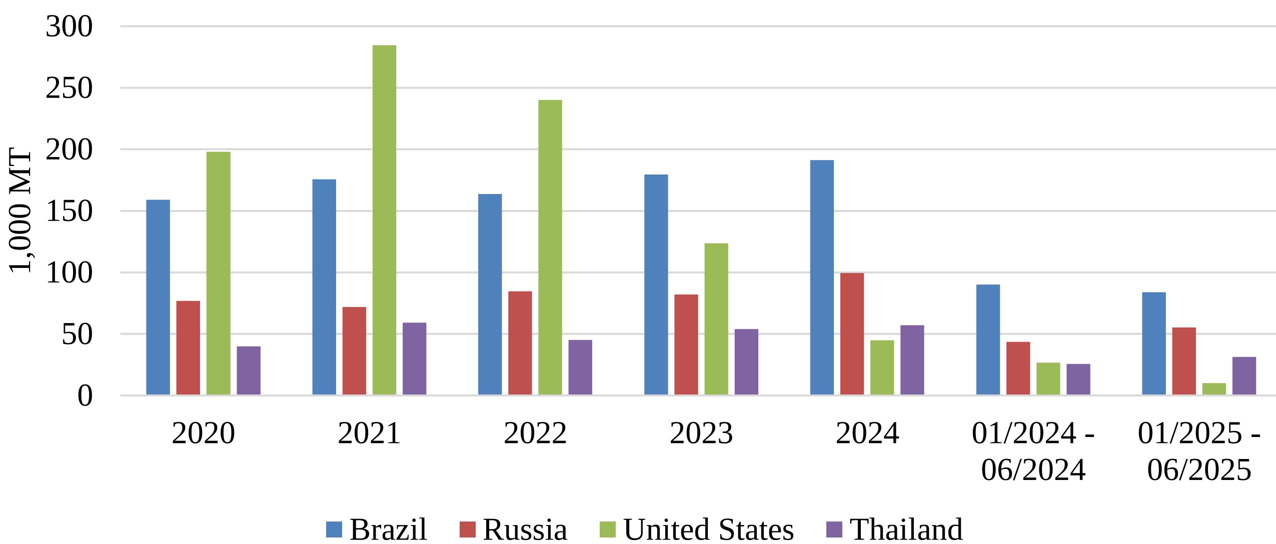
Frozen paws remain the primary form of chicken paw imports into China. Imports of U.S. frozen paws have declined in recent years as restrictions on shipments from U.S. states with HPAI detections, in place since 2022, have reduced available supply and contributed to a broader drop in total imports (see Chart 6 & Chart 7). Stricter Chinese customs inspections have added to this downward trend. If these constraints from the United States and the continued export restrictions on Brazil persist into 2026, frozen paw imports will likely remain under pressure, as alternative suppliers have limited capacity to offset the shortfall.

Chart 6. China: Frozen Chicken Paw Imports



Source: Trade Data Monitor, LLC

Chart 7. China: Frozen Chicken Paw Imports from Top Suppliers



Source: Trade Data Monitor, LLC

Heat-Treated Paws[3]

U.S. heat-treated paws are gaining market share in China due to their lower price and improved U.S. heat-processing methods that allow the product to be re-fried or further prepared after arrival. Sources indicate imports of heat-treated paws rose during the first half of 2025 but are currently facing stricter inspections and higher rejection risks. These non-tariff barriers, along with tariff uncertainties, are expected to limit further growth in heat-treated paw imports in 2026.

POLICY

Retaliatory Tariffs on U.S. Chicken Products

China currently imposes a 10-percent tariff on all U.S. products based on the joint agreement announced on May 12, 2025 (see GAIN Report CH2025-0111). On August 12, China announced an extension of the current tariff policy following trade negotiations in Stockholm (see GAIN report CH2025-0164). In addition, China imposed an additional 15-percent retaliatory tariff on poultry, wheat, corn, and cotton and 10-percent retaliatory tariff on sorghum, soybeans, pork, beef, aquatic products, fruit, vegetables, and dairy products on March 4, 2025, in response to U.S. tariffs on Chinese exports following China's failure to curb the flow of fentanyl precursor chemicals to the United States (see GAIN Report CH2025-0044).

China also imposes tariffs on a broad range of agricultural and non-agricultural goods in retaliation for U.S. Section 232 and U.S. Section 301 tariff actions. U.S. chicken products, amongst other U.S. agricultural goods, face retaliatory Section 301 tariffs (see Table 2). Chicken products do not face retaliatory Section 232 tariffs. On February 18, 2020, the State Council Tariff Commission (SCTC) announced a tariff exclusion process for U.S. agricultural commodities impacted by the retaliatory Section 301-tariffs. Importers may apply for tariff exclusions, which are approved on a case-by-case basis. These exclusions do not automatically extend to all importers. Many chicken meat importers have applied and received tariff exclusions. Please refer to FAS GAIN report Updated Guidance on China's Retaliatory Tariffs and Tariff Exclusions Process for US Products for more information on the exclusion process. China's Ministry of Finance recently extended the application deadline for Section 301 tariff exemptions to October 30, 2025, with approved exclusions remaining valid until December 13, 2025 (see GAIN Report CH2025-0513). The following tables summarize the current tariffs on U.S. chicken meat and paw exports to China.

[3] Heat treated chicken paws are under HS Code:16023299.

Table 2. China: Tariff Schedule for U.S. Chicken Meat and Chicken Paws

HS Code (8-digit)	Product Description	MFN Rate	Section 301 Retaliation*	SCTC Ann. No. 2	MOFCOM May 12, 2025	Total Applied Tariff	TOTAL APPLIED TARIFF WITH 301 EXCLUSION*
	Implementation Date	**1/1/2025**	**2/14/2020**	**3/10/2025**	**5/14/2025**	**5/14/2025**	**5/14/2025**
02071100	Chickens, not cut in pieces, fresh or chilled	20%	30.0%	15%	10%	75.0%	45.0%
02071200	Frozen Whole Chickens	20%	30.0%	15%	10%	75.0%	45.0%
02071311	Fresh Or Chilled Cuts Of Chicken, With Bone	20%	30.0%	15%	10%	75.0%	45.0%
02071319	Fresh or chilled cuts of chicken, other	20%	30.0%	15%	10%	75.0%	45.0%
02071321	Fresh or chilled wing of chicken (excluding wingtips	20%	30.0%	15%	10%	75.0%	45.0%
02071329	Fresh or chilled offal of chicken, other	20%	30.0%	15%	10%	75.0%	45.0%
02071411	Frozen Chicken Cuts, With Bone	0.6 RMB/kg	30.0%	15%	10%	55.0% + 0.6 RMB/kg	25.0% + 0.6 RMB/kg
02071419	Frozen Chicken Cuts, Nes	10%	30.0%	15%	10%	65.0%	35.0%
02071421	Frozen Midjoint Wing Of Chicken	0.8 RMB/kg	30.0%	15%	10%	55.0% + 0.8 RMB/kg	25.0% + 0.8 RMB/kg
02071422	Frozen Chicken Claw	1.0 RMB/kg	30.0%	15%	10%	55.0% + 1.0 RMB/kg	25.0% + 1.0 RMB/kg
02071429	Frozen Offal Of Chicken, Nes	0.5 RMB/kg	30.0%	15%	10%	55.0% + 0.5 RMB/kg	25.0% + 0.5 RMB/kg
16023210	Preparations Of Chicken, In Airtight Containers	5%	2.5%	15%	10%	32.5%	30.0%
16023291	Other Prepared Chicken Breast Filets	5%	10.0%	15%	10%	40.0%	30.0%
16023292	Other Prepared Meat Of Chicken Legs	5%	2.5%	15%	10%	32.5%	30.0%
16023299	Other Prepared Chicken, Chicken Offal Or Blood	5%	2.5%	15%	10%	32.5%	30.0%

Source: Customs Import and Export Tariff of China, State Council Tariff Commission Announcements

Attachments:

No Attachments