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Report Highlights:

FAS China forecasts that China’s chicken meat production will increase in 2026, with both white and yellow broiler output exceeding previous expectations due to a higher 2025 production base. Chicken meat consumption is projected to rise modestly, supported by affordability and stable institutional demand, while yellow broiler demand remains steady. Imports are expected to decline as domestic supply growth outpaces demand. Meanwhile, China’s chicken meat exports are set to continue expanding, driven by ample domestic supply, competitive pricing, and diversified export markets.

EXECUTIVE SUMMARY

FAS China provides this reporting and analysis as a service to U.S. farmers, ranchers, rural communities, and agribusinesses 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 chicken meat production to increase in 2026 year-on-year and revised the forecast upward compared to the previous report to reflect a higher 2025 production base driven by stronger white and yellow broiler production.

Consumption
Post forecasts China's 2026 chicken meat consumption to increase modestly. The product's relative affordability supports baseline demand amid cautious consumer spending, while institutional catering continues to provide stable purchases. Post expects yellow broiler demand to remain stable, while most growth in consumption will be driven by increased demand for white broiler products.

Trade
Post forecasts China's 2026 chicken meat imports to decline modestly as domestic supply growth exceeds demand growth. Although Brazil and Poland regained export eligibility, Post expects supplier reinstatements primarily to shift market shares rather than expand total imports. U.S. shipments are constrained by highly pathogenic avian influenza (HPAI) -related restrictions and tariffs.

Post forecasts China's 2026 chicken meat exports to continue growing, supported by ample domestic supply and competitive pricing across diversified markets.

Chicken Paws
Post expects frozen chicken paw imports to rebound in 2026 following Brazil's reinstatement but not exceed earlier peak levels due to weak macroeconomic conditions and soft foodservice demand. Post expects heat-treated paw imports to remain uncertain, with limited near-term impact from the newly signed protocol with Germany.

PRODUCTION

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

Meat, Chicken	2024		2025		2026	
Market Begin Year	Jan 2024		Jan 2025		Jan 2026	
China	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
						Unit: 1000 MT
Beginning Stocks	0	0	0	0	0	0
Production	15,350	15,350	16,200	16,500	16,700	17,300
Total Imports	477	477	300	297	400	285
Total Supply	15,827	15,827	16,500	16,797	17,100	17,585
Total Exports	770	770	1,050	1,085	1,200	1,200
Human Consumption	15,057	15,057	15,450	15,712	15,900	16,385
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	15,057	15,057	15,450	15,712	15,900	16,385
Total Use	15,827	15,827	16,500	16,797	17,100	17,585
Ending Stocks	0	0	0	0	0	0
Total Distribution	15,827	15,827	16,500	16,797	17,100	17,585

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

2026 Production Forecast Revised Upward on Higher 2025 Base

Post maintains its previous assessment that white broiler production in 2026 will increase year-on-year. However, Post revised the absolute production estimate upward compared to the prior report, reflecting a higher revised 2025 production base. Updated 2025 data indicate stronger-than-anticipated output, driven by both white broiler production and yellow broiler production.

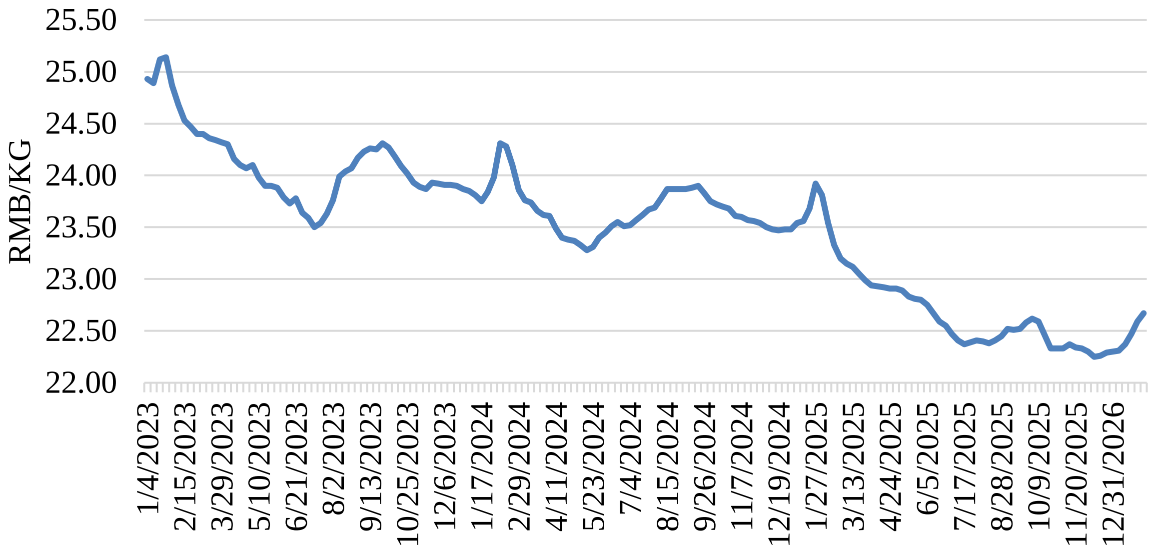
White Broiler Output Set for 2026 Growth on Strong Stock, Industry Expansion, and Sufficient Capacity

Post forecasts white broiler production in 2026 to increase year-on-year. Growth is primarily supported by high grandparent stock inventories, continued expansion by large integrated producers, and sufficient slaughtering and further processing capacity.

Grandparent stock inventories remained at relatively high levels in 2025, which provide a stable supply foundation for 2026 commercial broiler production. U.S. day-old chick imports were excluded from the Chinese market in 2025 due to highly pathogenic avian influenza (HPAI) restrictions. Although France also experienced HPAI outbreaks, China adopted region-specific measures that permitted continued imports from unaffected areas in France. China has not applied similar region-specific measures to the United States, keeping U.S. day-old chicks out of the market. In addition, domestic breeding varieties supported normal grandparent stock updates, helping to reduce reliance on any single import source.

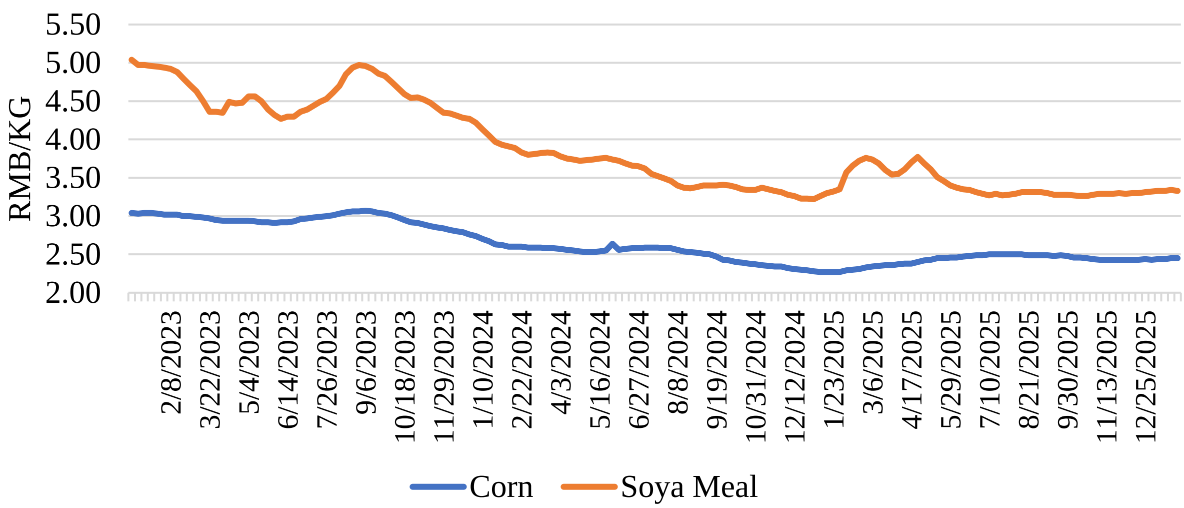
Large integrated producers continued to expand in 2025, maintaining profitability through strong performance in chicken processing and value-added product segments, which offset weakness in broiler farming. Lower feed costs, particularly for corn and soybean meal, helped narrow losses for standalone growers, although financial pressure persisted due to weak chicken meat prices as production growth outpaced demand in 2025 (see Chart 1). Declines in corn and soybean meal prices reduced per-bird production costs, easing financial strain at the farm level (see Chart 2). While standalone growers faced challenges, integrated companies were able to leverage processing margins to maintain profitability.

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



Source: China's Ministry of Agriculture and Rural Affairs (MARA)

Chart 2. China: Corn and Soybean Meal Prices



Source: MARA

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

Additionally, slaughtering and further processing facilities were underutilized in 2025, leaving sufficient capacity to absorb additional output and support higher white broiler production in the current year.

Yellow Broiler Production in 2026 to Remain Stable

Post maintains its previous forecast that 2026 yellow broiler production in 2026 will remain stable. While large companies expanded output in 2025, small-scale growers continued to exit the sector. Lower farm-level profitability is expected to moderate further expansion by large producers in 2026. Post does not anticipate strong growth in yellow broiler demand (see Consumption section), which further limits incentives for expansion. Large companies primarily raise fast- and medium-growing yellow broilers with shorter production cycles and greater operational efficiency, while small-scale producers tend to raise slower-growing birds with longer cycles. Because smallholders are more vulnerable to price volatility and typically operate with slower capital turnover due to longer production cycles, Post forecasts continued smallholder exit is expected to offset slower growth among large companies, keeping overall production steady.

2025 Production Estimate Revised Higher

Post revised its 2025 production estimate upward, with growth observed in both white and yellow broiler segments. While prior Post projections noted most of the growth would come from white broiler segments, sources indicate that both white and yellow broiler production increased in 2025. Expansion among large-scale companies drove increases, despite ongoing smallholder exit. This stronger performance in 2025 supports the higher forecast for 2026.

CONSUMPTION

Chicken Meat Consumption in 2026 to Increase Modestly amid Cautious Spending

Post forecasts a modest increase in China's chicken meat consumption in 2026 compared to 2025, as consumers remain cautious amid ongoing economic pressures. Chicken meat's relative affordability continues to make it an attractive protein choice, especially as demand for higher-priced proteins remains subdued in both retail and food service channels.

Gradual Substitution from Pork and Changing Diet Preferences

Shifting dietary habits, particularly among younger consumers, are supporting incremental growth. Post expects chicken to increasingly substitute for pork in selected consumption occasions as dietary habits continue to evolve. Industry contacts indicate preferences are moving toward convenient and standardized products such as fried chicken, boneless cuts, and ready-to-cook items, which primarily use white broiler meat. Post expects this gradual shift in protein choices to provide incremental support to chicken meat consumption in 2026 beyond traditional price-driven substitution effects.

Institutional Catering to Provide Stable Demand

Post expects institutional catering channels, including schools and workplace canteens, to continue providing a stable demand base for chicken meat in 2026. These buyers typically prioritize cost control and standardized supply, which supports steady purchasing of chicken products and helps anchor overall chicken consumption even when discretionary spending remains subdued.

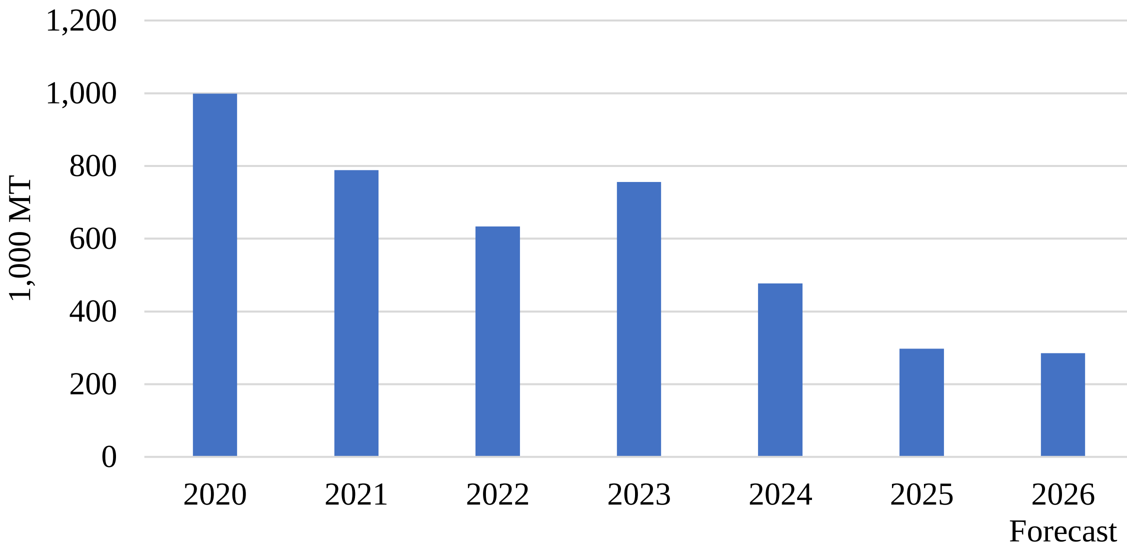
Yellow Broiler Demand to Remain Stable
Post expects yellow broiler consumption to remain broadly stable in 2026. Yellow broilers generally trade at a premium and consumption is more concentrated in southern regional markets and higher-value dining and traditional household occasions. Given cautious consumer spending and limited expansion in higher-value segments, Post does not expect yellow broiler demand to drive overall chicken meat consumption growth in 2026.

TRADE

Imports

Chicken Meat Imports in 2026 to Decline
Post forecasts a modest decline in China's chicken meat imports in 2026 compared to 2025, maintaining the downward trend projected in the previous report. However, as actual 2025 import volumes came in lower than earlier estimates (see Chart 3), Post revised its 2026 import forecast downward accordingly. Although Brazil regained export eligibility in late 2025, Post expects domestic supply growth to exceed demand growth in 2026, reducing the need for additional imported volumes.

Chart 3. China: Imports[2] of Chicken Products



Source: USDA Official Data and Post Forecast

Domestic Supply Growth Outpaces Demand and Limits Import Expansion
Post expects domestic chicken meat supply to expand faster than demand growth in 2026, constraining import demand. Incremental market needs are expected to be absorbed primarily by domestic production, as traders focus on smaller orders and tighter inventory control. Under these conditions, imported frozen products could face substitution pressure and limited room for volume expansion.

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

Supplier Reinstatements Adjust Market Shares but Do Not Expand Total Imports

Post expects Brazil's return to the Chinese market to improve overall supply availability. On October 31, 2025, China's Ministry of Agriculture and Rural Affairs (MARA) and the General Administration of Customs of China (GACC) jointly lifted the HPAI-related import suspension on Brazilian poultry products, following their suspension in May 2025. On the same day, GACC and MARA also issued an announcement permitting poultry and poultry products from Poland that meet China's regionalization and biosecurity requirements to resume exports to China.

Post expects Brazil's reinstatement to intensify competition and shift supplier market shares. However, given expanding domestic supply and cautious procurement behavior, Brazil's return is more likely to replace volumes from other origins rather than generate net growth in China's total chicken meat imports. Poland is not a major supplier to China, and its return is unlikely to materially alter China's overall import volume.

U.S. Shipments Remain Constrained by HPAI Restrictions and Tariffs

Post expects U.S. chicken exports to China to remain constrained in 2026. Most U.S. states remain under HPAI-related export restrictions imposed by GACC, which has not updated HPAI status for any U.S. state since 2023 despite a bilateral protocol agreement. In addition to sanitary constraints, U.S. chicken products face tariff measures (see Policy Section).

Post expects importers operating with thin margins to favor suppliers with greater regulatory and policy predictability. Given ongoing HPAI-related eligibility limits and exposure to tariffs, U.S. shipments are unlikely to see significant recovery in 2026.

2025 Imports Revised Down Based on Customs Data

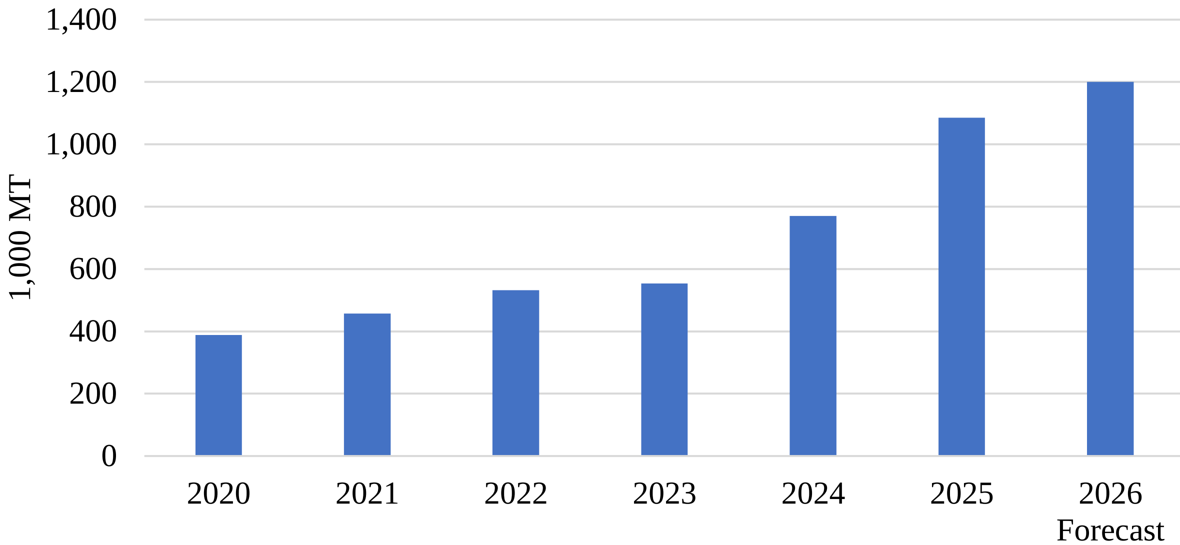
Post revised down its 2025 chicken meat import figure based on official customs data. Actual imports declined more sharply year-over-year than previously forecast. Stronger-than-anticipated growth in domestic production increased overall market supply and reduced reliance on imported products. In addition, Brazil's previously mentioned HPAI- related suspension in May 2025 further depressed total import volumes.

Exports

Chicken Meat Exports in 2026 to Continue Growing

Post forecasts China's chicken meat exports in 2026 to continue increasing year-over-year. Post revised up the 2026 forecast following stronger-than-anticipated export performance in 2025. Official customs data confirm that 2025 exports reached 1,085 thousand metric tons (TMT), exceeding Post's previous projection (see Chart 4). As a result, the 2026 export forecast has been revised upward, with continued year-over-year expansion expected.

Chart 4. China: Exports of Chicken Products

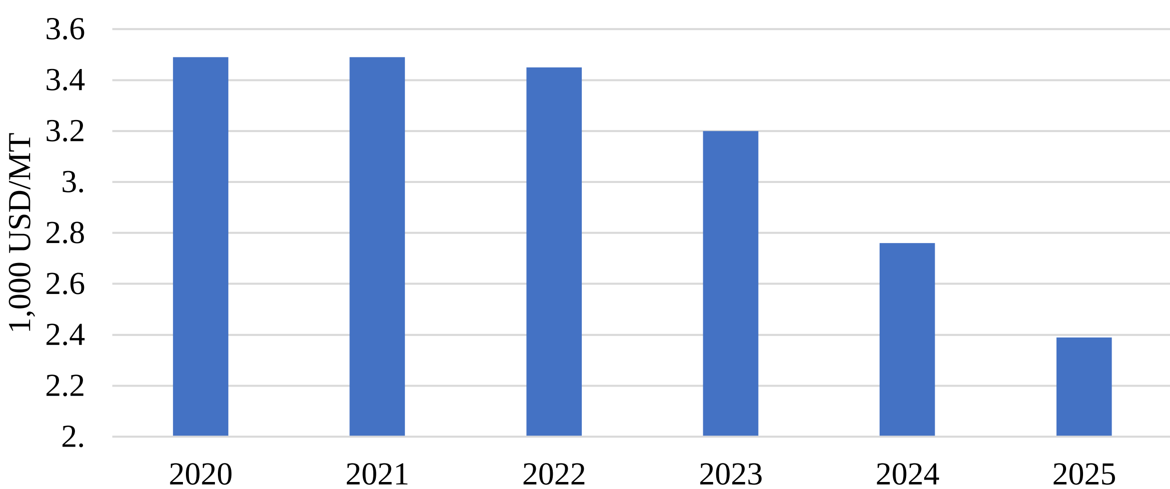


Source: USDA Official Data and Post Forecast

Ample Domestic Supply and Price Competitiveness Drive Export Expansion

Post expects that expanding domestic supply will continue to support stable export volumes. The rapid increase in exports from 770 TMT in 2024 to 1,085 TMT in 2025 was enabled by greater domestic availability, which provided additional exportable supplies. As production expands, processors are increasingly seeking external markets to balance output. At the same time, Chinese-origin chicken products remain price competitive in many destination markets, as shown by the ongoing decline in export values (see Chart 5). Together, sufficient supply and competitive pricing are the main factors driving export growth.

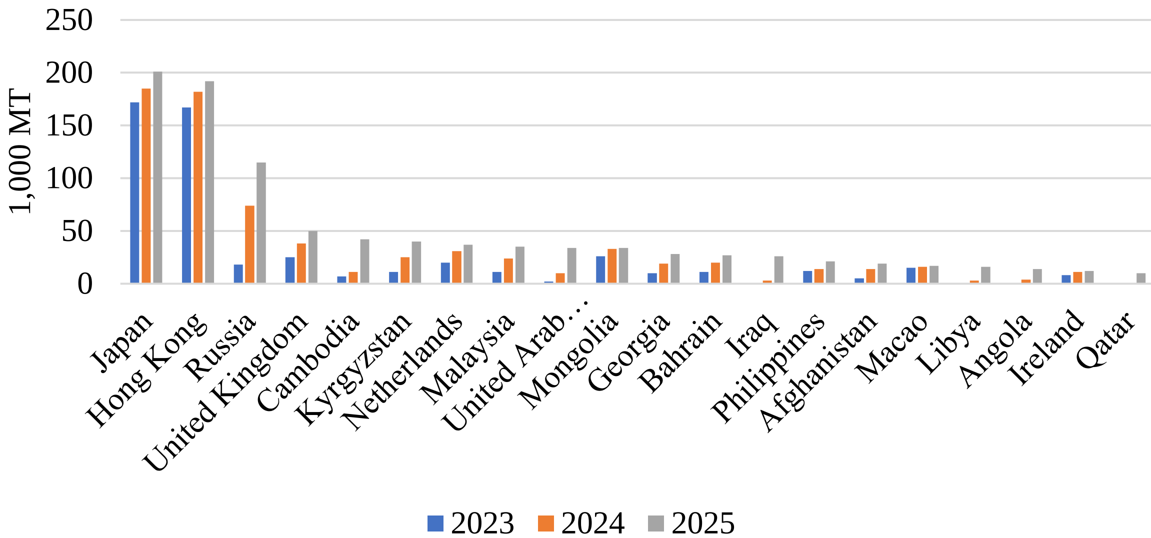
Chart 5. China: Chicken Meat Export Unit Value



Source: Trade Data Monitor, LLC

Diversified Destination Markets Support Continued Growth
Japan and Hong Kong remain the two largest export destinations, though growth in these markets has been relatively moderate. Export expansion increasingly reflects growth in a wider range of destinations such as Russia, the United Kingdom, Cambodia, and Kyrgyzstan (See Chart 6). While many emerging destinations are small individually, they collectively contribute to overall export growth.

Chart 6. China: Selected Chicken Meat Export Destinations



Source: Trade Data Monitor, LLC

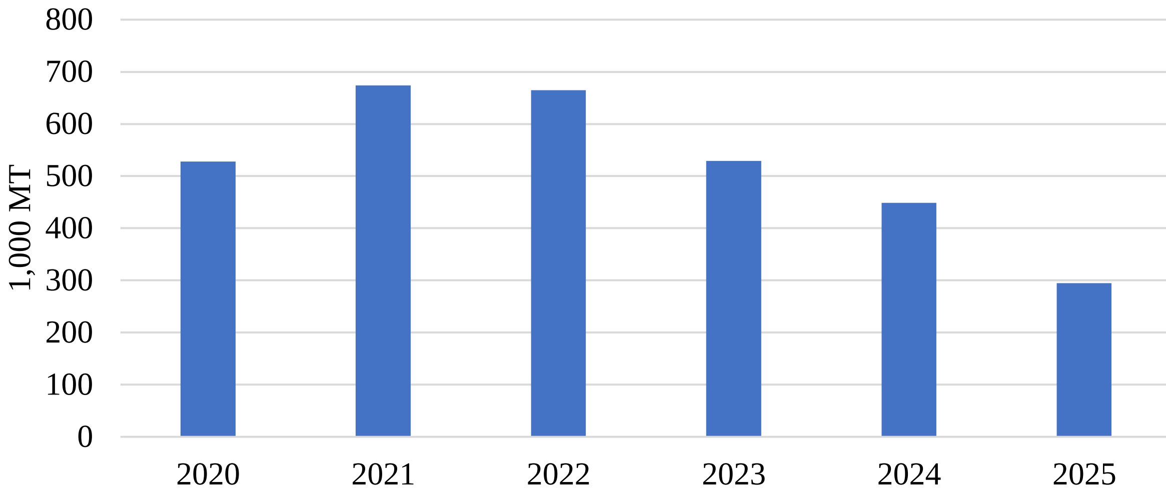
2025 Exports Revised Up
Post revised its 2025 export estimate upward based on official customs data, which showed stronger year-over-year growth than previously projected. This higher-than-expected performance was driven by increased price competitiveness and expansion into new markets, resulting in a higher baseline for the 2026 forecast.

CHICKEN PAWS

<u>Frozen Chicken Paws</u>

Frozen Chicken Paw Imports in 2026 to Rebound Following Supplier Reinstatement
Post revises its forecast and now expects China's 2026 frozen chicken paw imports to increase compared to 2025, driven primarily by the reinstatement of top exporter Brazil in late 2025. In the previous report, Post projected declining imports under continued supply constraints. With supply conditions improving, Post expects import volumes to recover toward more typical levels in 2026. However, Post does not expect imports to surpass earlier peak levels, as China's tepid economic environment and soft restaurant demand limit upside potential. Chicken paws are not a staple protein in household consumption, and demand remains concentrated in foodservice and snack channels, which continue to face profitability challenges. As shown in Chart 7, import volumes declined in 2025 amid supply disruptions and are likely to recover in 2026.

Chart 7. China: Frozen Chicken Paw Imports



Source: Trade Data Monitor, LLC

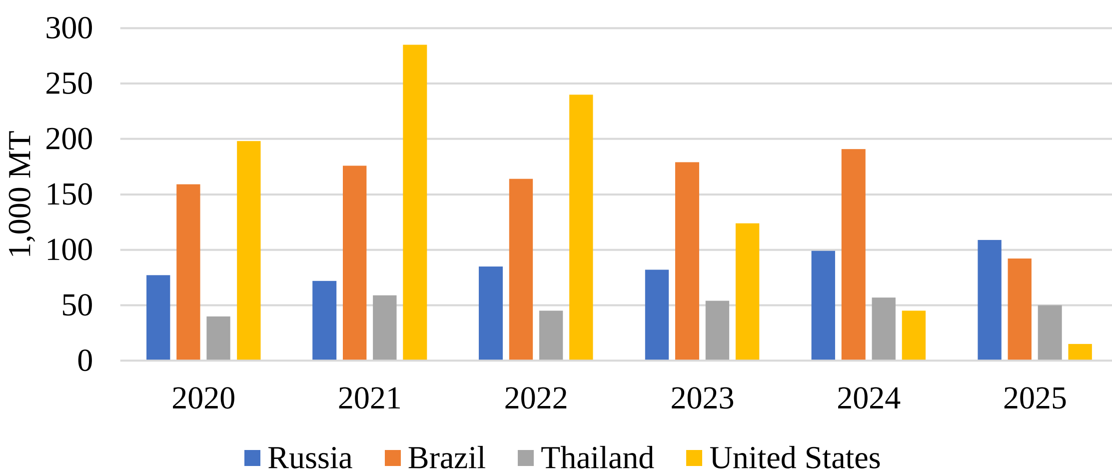
Domestic Production Insufficient to Meet Demand

Although China's white broiler production continues to expand, domestic output of chicken paws remains insufficient to fully satisfy market demand. Industry sources report that locally produced paws are generally smaller and of lower quality compared to imported products, limiting their substitution potential in snack food and foodservice channels. As a result, China remains structurally reliant on imports to fill the supply gap.

Brazil's Return to the Market to Drive Import Recovery

Brazil, previously China's largest supplier of frozen chicken paws, was suspended from the market in 2025 due to HPAI. Russia temporarily increased shipments but could not fully offset the shortfall (see Chart 7). With Brazil's reinstatement in late 2025, shipments are expected to resume in 2026, significantly improving supply. Brazil's return is the main factor behind the projected import rebound.

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



Source: Trade Data Monitor, LLC

U.S. Frozen Shipments Remain Constrained
U.S. frozen chicken paw exports continue to face uncertainty due to HPAI-related restrictions. The timing of a full resumption of U.S. frozen product access remains unclear. While U.S. shipments may fluctuate, Brazil's recovery is expected to play the central role in driving overall import growth in 2026.

Heat-Treated Paws[3]

Heat-Treated Chicken Paw Imports in 2026 to Face Continued Uncertainty
Post expects China's 2026 imports of heat-treated chicken paws to remain uncertain. In 2025, the United States was the only country with access for heat-treated poultry, serving as an alternative channel while raw frozen shipments were restricted. However, industry sources noted that increased non-tariff measures led to a high rejection rate for U.S. heat-treated shipments. Given the freeze on U.S. access, heat-treated imports are likely to remain limited.

Protocol with Germany Sets Stage for Exports, Limited 2026 Impact
In February 2026, China and Germany signed a protocol establishing requirements for German heat-treated poultry exports to China. While this agreement creates a regulatory pathway and clarifies standards, German establishments must complete registration before exports can begin. The protocol is a preliminary step, and its impact on 2026 import volumes is expected to be limited.

POLICY

Tariffs on U.S. Products
On November 5, 2025, the State Council Tariff Commission (SCTC) announced the removal of the 10-15 percent tariffs imposed on 740 U.S. agricultural products (SCTC Announcement No. 9 of 2025), including chicken products, with an effective date of November 10, 2025 (see GAIN Report CH2025-0050). However, the 10 percent tariffs on all products from the United States (SCTC Announcement No. 7 of 2025), including chicken products, remain in place. See GAIN Report CH2025-0209) for additional information on the timeline of China's tariffs on U.S. agricultural products.

The tariff exclusion process introduced by the State Council Tariff Commission (SCTC) in March 2020 (see GAIN report CH2020-0017) remains in effect. The program allows importers to apply for tariff exclusions on the Chinese Government's retaliatory Section 301 tariffs on U.S. products, including chicken products. The Ministry of Finance has reportedly extended the market-based Section 301 tariff exclusion process to December 31, 2026 (see GAIN Report CH2025-0223). The following tables summarize the current tariffs on U.S. chicken 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 March 10, 2025	SCTC Ann. No. 7 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%	0%	10%	60.0%	30.0%
02071200	Frozen Whole Chickens	20%	30.0%	0%	10%	60.0%	30.0%
02071311	Fresh Or Chilled Cuts Of Chicken, With Bone	20%	30.0%	0%	10%	60.0%	30.0%
02071319	Fresh or chilled cuts of chicken, other	20%	30.0%	0%	10%	60.0%	30.0%
02071321	Fresh or chilled wing of chicken (excluding wingtips	20%	30.0%	0%	10%	60.0%	30.0%
02071329	Fresh or chilled offal of chicken, other	20%	30.0%	0%	10%	60.0%	30.0%
02071411	Frozen Chicken Cuts, With Bone	0.6 RMB/kg	30.0%	0%	10%	40.0% + 0.6 RMB/kg	10.0% + 0.6 RMB/kg
02071419	Frozen Chicken Cuts, Nes	10%	30.0%	0%	10%	50.0%	20.0%
02071421	Frozen Midjoint Wing Of Chicken	0.8 RMB/kg	30.0%	0%	10%	40.0% + 0.8 RMB/kg	10.0% + 0.8 RMB/kg
02071422	Frozen Chicken Claw	1.0 RMB/kg	30.0%	0%	10%	40.0% + 1.0 RMB/kg	10.0% + 1.0 RMB/kg
02071429	Frozen Offal Of Chicken, Nes	0.5 RMB/kg	30.0%	0%	10%	40.0% + 0.5 RMB/kg	10.0% + 0.5 RMB/kg
16023210	Preparations Of Chicken, In Airtight Containers	5%	2.5%	0%	10%	17.5%	15.0%
16023291	Other Prepared Chicken Breast Filets	5%	10.0%	0%	10%	25.0%	15.0%
16023292	Other Prepared Meat Of	5%	2.5%	0%	10%	17.5%	15.0%

	Chicken Legs						
16023299	Other Prepared Chicken, Chicken Offal Or Blood	5%	2.5%	0%	10%	17.5%	15.0%

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

Attachments:

No Attachments