United States Department of Agriculture
Foreign Agricultural Service

GAIN
Global Agricultural Information Network

Voluntary Report – Voluntary - Public Distribution

Date: April 30, 2026

Report Number: CH2026-0060

Report Name: Poultry Demand in the Yangtze River Delta

Country: China - People's Republic of

Post: Shanghai ATO

Report Category: Poultry and Products

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Report Highlights:

Poultry consumption in the Yangtze River Delta (YRD) continues to grow, with Jiangsu and Anhui provinces driving increases, while Shanghai remains a mature and stable market. Poultry is gaining market share from pork, supported by its lower cost, versatility, and perceived health benefits. Foodservice expansion, e-commerce development, and cold-chain improvements are key drivers of demand, particularly for convenient and value-added poultry products.

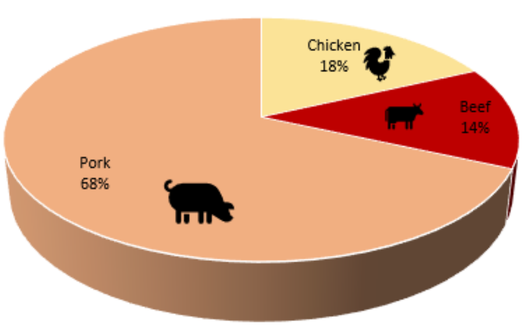
Market Overview

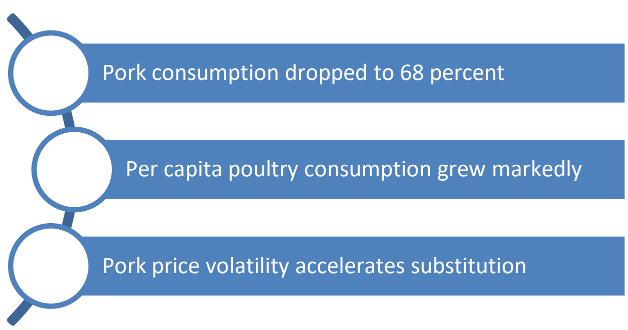
The Yangtze River Delta region (Shanghai, Jiangsu, Zhejiang, and Anhui) represents about a quarter of China's overall GDP. Its main city, Shanghai, is the single-largest city in China by nominal GDP (approx. $800 billion in 2025). The Yangtze River Delta region's average per capita disposable income is 1.5 times the national average level, which drives strong and stable demand for higher value imported animal-protein foods.

GDP Share of Yangtze River Delta in China

Historically, China has been a dominant pork consumer. In recent years, however, poultry has been steadily gaining ground as an alternative, driven by its affordability and perceived nutritional benefits. Data from the Chinese National Statistics Bureau show that per capita poultry consumption increased from 8.4 kg (18.5 lb) in 2015 to 12.5 kg (27.6 lb) in 2024—implying the average Chinese consumer in recent years eats about 1.5 times as much poultry as they did a decade ago.

Major Meat Consumption in the China Market 2025





Data Source: USDA PSD, major consumption categories include pork, chicken, and beef.

Consumer Appetite for Poultry Meat in the Yangtze River Delta

Poultry Consumption in Kilograms per Capita (2015-2024)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024		CAGR
Shanghai	12.1	13.3	12.8	12.3	13.1	14	14.2	12.6	12.7	13		0.80%
Jiangsu	9.9	11.1	10.3	10.7	12.4	13.2	14	14.2	15.9	16.6		5.91%
Zhejiang	9.8	10.6	10.6	10.7	11.9	13	14.3	13.8	13.2	14.1		4.12%
Anhui	10.8	11.9	10.2	12	14.7	15.7	15.5	15	17.1	17.8		5.71%
National	8.4	9.1	8.9	9	10.8	12.7	12.3	11.7	12.4	12.5		4.52%

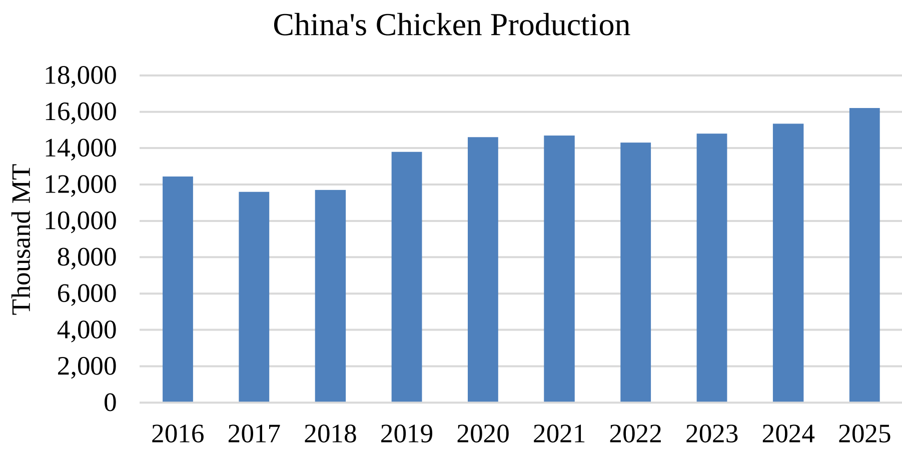
Data Source: China National Bureau of Statistics
CAGR stands for Compound Annual Growth Rate

In the past 10 years, poultry consumption in the Yangtze River Delta exhibited an overall upward trend, accompanied by regional divergence. A clear contrast emerges between Shanghai and its neighboring provinces—with particularly strong growth observed in Jiangsu and Anhui. Shanghai's per capita poultry consumption remained largely stable, registering a modest CAGR of 0.8 percent. Consumption fluctuated within a narrow range, from 12.1 kg (26.7 lb) in 2015 to a peak of 14.2 kg (31.3 lb) in 2021, reflecting the characteristics of a mature and saturated urban market. In Shanghai, dietary patterns are highly diversified, and poultry competes with a wide variety of alternative protein sources, limiting expansion in per capita demand. By contrast, Jiangsu, Zhejiang, and Anhui all experienced robust growth in poultry consumption over the same period. Jiangsu and Anhui emerged as the regional leaders, with CAGRs of 5.9 percent and 5.7 percent, respectively. By 2024, Anhui's per capita poultry consumption reached 17.8 kg (39.2 lb), surpassing all other regions in the dataset and highlighting its rapid demand expansion.

Several factors underpin the stronger growth observed in Jiangsu and Anhui. First, agricultural resources play a crucial role. Both provinces host large-scale poultry breeding industries, ensuring ample supply and relatively lower local prices compared with Shanghai, which is a major consumption center but has limited local production. Second, dietary culture and regional food traditions differ. Poultry, particularly chicken and duck, has long been deeply embedded in everyday diets and festive cuisine in Jiangsu and Anhui, with local dishes such as Jiangsu-style braised duck and Anhui stewed chicken sustaining consistent demand. Third, economic and demographic dynamics further reinforce growth. Jiangsu's rapid urbanization and rising household incomes have increased demand for affordable, high-protein animal products, while Anhui's combination of entrenched rural consumption habits and improving living standards has driven sustained increases in per capita poultry intake.

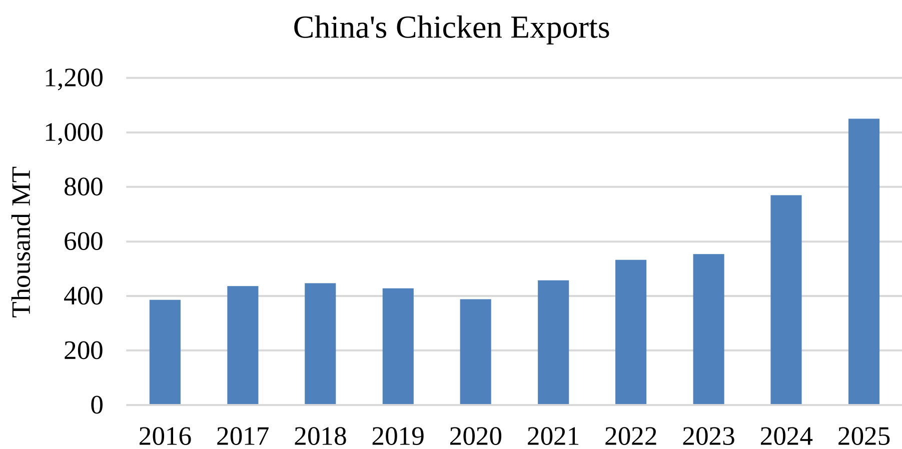
The Trade, Import and Export Context

Production: After a modest decline in 2017–2018, production expanded steadily from 2019 onward, increasing from approximately 13.8 million metric tons (MMT) in 2019 to 16.5 MMT in 2025. This growth indicates strengthening domestic capacity, efficiency gains, and continued investment in the poultry sector, positioning production as the primary driver of supply growth.



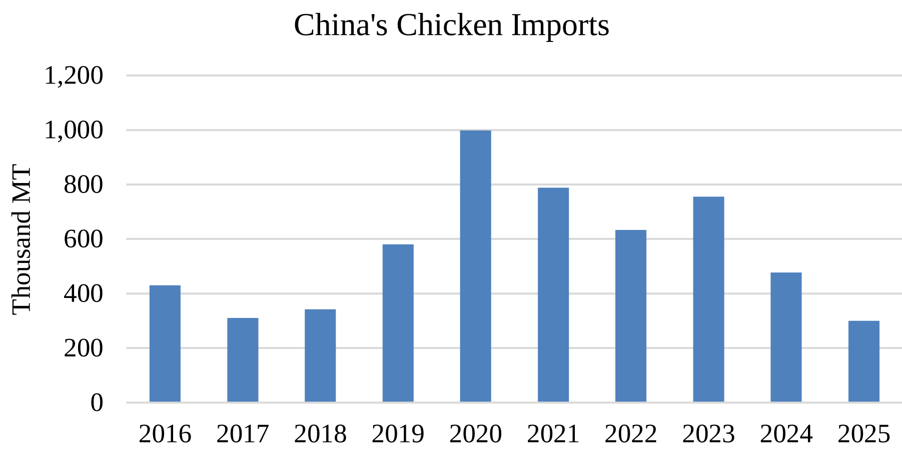
Data Source: USDA PSD

Exports: Chicken meat exports increased gradually between 2016 and 2022, followed by a more pronounced acceleration from 2023 onward. Export volumes rose sharply from 554,000 metric tons in 2023 to a 1.1 MMT in 2025, signaling a shift toward greater international market engagement.



Data Source: USDA PSD

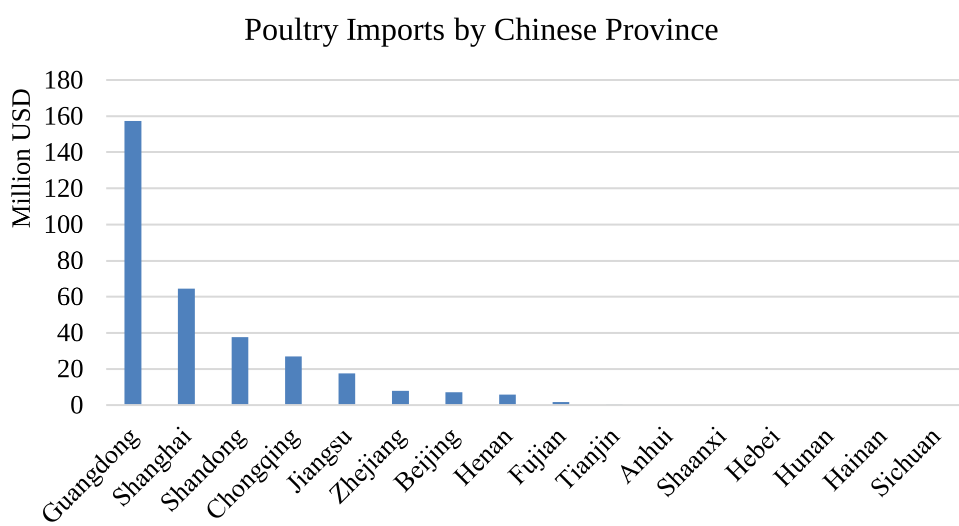
Imports: Imports declined from 2016 to 2018, followed by a sharp surge in 2019–2020, peaking at nearly 1 MMT in 2020. This spike likely reflects short-term supply disruptions and gap-filling demand. After 2020, imports trended downward overall, with fluctuations through 2023 and a marked decline for 2024–2025, suggesting reduced reliance on external supply as domestic availability improves.



Data Source: USDA PSD

Regional Importers

China’s poultry import market shows strong regional concentration, with Guangdong ranking first nationwide, recording poultry imports worth $157.3 million. Shanghai followed with $64.4 million, a figure driven by the city’s role as a key import and distribution hub, serving the wider Yangtze River Delta and other domestic markets through its advanced logistics and transportation networks.



Data Source: GACC (Unit: USD in value)

Poultry Consumption Trends in the Region

Franchise and Food Service Driving Poultry Demand

Poultry consumption in China, particularly white-feather broiler meat, has increased alongside rapid urbanization and the expansion of foodservice chains. In the Yangtze River Delta region—including

Shanghai, Jiangsu, Zhejiang, and Anhui—the number of franchise stores reached 24,562 in 2024, growing at an average rate of 9–18 percent annually over the past decade.

Franchise Store Count in Shanghai, Jiangsu, Zhejiang, and Anhui (2015–2024)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	CAGR
Shanghai	3127	3603	3888	6202	7008	7378	8346	8731	13119	14184	18%
Jiangsu	1491	1527	1598	1707	1798	1835	2090	2446	4051	4730	14%
Zhejiang	1736	1741	1940	2074	2028	2241	2675	2823	3583	3910	9%
Anhui	650	690	747	855	738	1135	1272	1290	1649	1738	12%

Data Source: China National Bureau of Statistics

Two leading American brands, KFC and McDonald's, both have ambitious expansion plans in China. McDonald's plans to open 1,000 new stores in the country in 2026, while KFC aims to reach a total of 17,000 stores by 2028. Fried chicken's crispy texture and versatile flavors align well with Chinese taste preferences, and fast-paced urban lifestyles are fueling demand for convenient takeout and ready-to-eat poultry products.

Premade Poultry Products Gaining Popularity

Prefabricated or ready-to-cook chicken products are emerging as a key consumption trend in the region, with as much as 80 percent of surveyed Chinese consumers purchasing premade chicken products—higher than any other premade meat segment. Busy urban consumers increasingly prefer pre-portioned, marinated, or ready-to-heat chicken products that reduce preparation time while maintaining flavor and quality. Items such as seasoned chicken wings, fried chicken cutlets, and heat-and-serve meals are widely available in supermarkets and convenience stores.

Pre-made chicken products targeting consumers seeking healthier options and superior taste, displayed at a high-end supermarket in Hangzhou.

The growth of premade chicken products is supported by the highly developed cold chain infrastructure in the Yangtze River Delta. According to the China Federation of Logistics & Purchasing, East China is projected to account for 50 percent of national cold chain capacity demand in 2025. As consumption of premade foods continues to rise, the Chinese Government is also making efforts to develop regulatory standards to ensure food safety, standardize production processes, and improve labeling and traceability across the industry.

E-Commerce Shaping Modern Poultry Consumption

The Yangtze River Delta is home to one of China's most advanced e-commerce ecosystems, supported by dense logistics networks, leading digital platforms, and a highly urbanized consumer base. Alibaba

Group’s grocery shopping subsidiary Hema reported operational revenue growth exceeding 40 percent in 2025, with gross merchandise value (GMV) surpassing $14 billion. Livestreaming programs on major platforms actively promote local Chinese yellow-feather chicken, while white-feather chicken is predominantly consumed in premade formats.

Consumer preferences vary notably across demographic groups:

- Younger consumers prefer flavorful poultry products that combine good value with convenient, ready-to-eat options.
- Older consumers often favor chicken prepared using traditional cooking methods.
- Female consumers are particularly attentive to the low-fat characteristics of chicken when making purchasing decisions.

Below are the Top 5 Best-Selling Products on Hema.

- *Qingyuan Chicken – A locally sourced, premium yellow-feather chicken.*
- *Antibiotic-Free Old Hen – Valued for natural rearing practices and rich flavor.*
- *New Orleans Flavored Chicken Wing – Ready-to-eat, Western-style flavor.*
- *Chicken Cutlet – A convenient, widely accepted snack format.*
- *Tyson Grilled Skewers – Packaged grilled skewers targeting younger consumers.*

Stable Demand for Chicken Paws

Chicken paws remain one of the most popular poultry by-products in the Yangtze River Delta, particularly in snack foods, braised dishes, prepared foods sold through convenience stores, and e-commerce channels. U.S. chicken paws are highly recognized in the market due to their larger size, consistent quality, and reliable processing standards.

Consumption Overview for Chicken Paws

1. Snack Foods (approx. 50 percent): Chicken paws are widely consumed as snack foods. Products such as pickled pepper chicken paws and lemon-flavored boneless chicken paws have become a “must-have” snack for young people while watching TV series or online shows. Brands such as Wang Xiaolu and Youyou Foods each generate annual sales exceeding $700 million.

2. Foodservice Sector (approx. 30 percent): Chicken paws are also popular in restaurants. Common dishes include tiger-skin chicken paws served in hot pot restaurants, Sichuan and Chongqing-style braised chicken paws, and Cantonese black bean steamed chicken paws. Individual restaurants can sell up to 200 kilograms of chicken paws per day.

3. Home Consumption (approx. 20 percent): The growth of prepared foods has brought ready-to-eat chicken paw products into household refrigerators. On Douyin, cooking tutorials featuring chicken paw recipes have accumulated more than 5 billion views.

Shift Toward Fresh and Chilled Poultry in Urban Markets

Urban consumers in the Yangtze River Delta increasingly prefer fresh or chilled poultry products as modern supermarkets and cold-chain logistics continue to expand. This shift is also reinforced by food safety policies; for example, many major cities have restricted or eliminated live poultry trading and moved toward centralized slaughter and chilled distribution. However, frozen poultry products still dominate consumption in price-sensitive segments and in smaller cities across Anhui and northern Jiangsu due to their affordability and longer shelf-life.

Health-Oriented Consumption Patterns Across Age Groups

Health and lifestyle trends are increasingly influencing poultry consumption in the region. Younger consumers—particularly those engaged in fitness and active lifestyles—often prefer lean, high-protein options such as chicken breast. Meanwhile, older consumers continue to value traditional poultry dishes such as chicken soup, which is widely perceived as nutritious and beneficial for recovery and general health.

Yangtze River Delta represents one of China's most dynamic poultry markets, characterized by strong underlying demand, evolving consumption patterns, and an increasingly sophisticated supply chain. While mature markets such as Shanghai show stable, high-level consumption, neighboring provinces including Jiangsu and Anhui are driving incremental growth, supported by rising incomes, local production advantages, and deeply rooted dietary preferences. At the national level, the steady expansion of domestic production, declining reliance on imports and continued growth in exports underscore China's efforts for self-sufficiency, even as targeted import demand—particularly for specific products such as chicken paws—remains resilient. Looking ahead, poultry consumption in the region will continue to be shaped by foodservice expansion, the rapid rise of e-commerce, and shifting consumer preferences toward convenience, quality, and health-oriented products.

These trends present sustained opportunities for suppliers able to align with demand for value-added, branded, and differentiated poultry products in one of China's most affluent and consumption-driven regions.

Representative Poultry-Focused Chains in the Yangtze River Delta

The following representative brands illustrate how poultry consumption in the Yangtze River Delta is commercialized across multiple channels, including traditional dining, ready-to-eat retail, snack foods, and standardized fast-casual formats.

1. Zhen Ding Ji (振鼎鸡): A Shanghai-based poultry restaurant chain best known for its signature white-cut chicken. Founded in 1996, the brand focuses on freshly prepared, traditional-style poultry dishes such as chicken, chicken noodles, and porridge. With a strong concentration of

outlets in Shanghai, it reflects localized consumption patterns and the enduring popularity of simple, freshly prepared poultry meals in urban markets.

2. Ziyan Baiwei Ji (紫燕百味鸡): A leading Shanghai-headquartered chain specializing in ready-to-eat braised poultry products, including chicken, duck, and offal items. The brand operates primarily through takeaway storefronts and has achieved nationwide scale through franchising. Its standardized production and cold-chain distribution model align closely with rising demand for convenient, prepared poultry foods. While headquartered in Shanghai, the brand has strong historical roots in Jiangsu.

3. Zhengxin Chicken Steak (正新鸡排): A Shanghai-based well-known fried chicken cutlet chain with a strong presence in lower-tier cities. Its affordable pricing and standardized franchise model have enabled rapid expansion across China.

4. Lao Xiang Ji (老乡鸡): Headquartered in Hefei, Lao Xiang Ji is one of China's largest chicken-focused fast-casual chains. The brand emphasizes Chinese-style meals centered on chicken, such as stewed chicken and chicken soup, and has expanded rapidly across the Yangtze River Delta, particularly in Shanghai and Jiangsu. Its success reflects strong consumer demand for standardized, home-style poultry dishes in urban markets.

Representative Regional Poultry Dishes in the Yangtze River Delta

Poultry consumption in the Yangtze River Delta is deeply rooted in regional culinary traditions. Unlike standardized fast-food formats, many locally popular poultry dishes reflect long-standing dietary habits and cooking techniques, providing important insights into stable, culturally embedded demand across provinces.

Shanghai

- White-Cut Chicken (白斩鸡): A classic Shanghai-style dish featuring poached chicken served with light seasoning. It emphasizes freshness and original flavor, reflecting local preferences for simple and minimally processed poultry.

Jiangsu

- Nanjing Salted Duck (南京盐水鸭)
  One of the most iconic poultry dishes in Jiangsu, known for its tender texture and mild, savory flavor. Widely consumed as both a daily food and a specialty gift item.
- Braised Duck (酱鸭 / 卤鸭): Common across Jiangsu cities, these products are often sold through takeaway shops and represent an important segment of ready-to-eat poultry consumption.

Zhejiang

- Beggar's Chicken (叫化鸡): A traditional Hangzhou dish in which a whole chicken is wrapped (typically in lotus leaves and clay) and slow-cooked. It is associated with premium dining and tourism-driven consumption.

- Soy Sauce Braised Chicken (酱油鸡): A widely consumed home-style dish in Zhejiang cuisine, reflecting strong everyday demand for poultry in household cooking.

Anhui

- Huangshan Stewed Chicken (黄山炖鸡): A representative Anhui dish known for rich broth and use of local ingredients such as mushrooms. It reflects the region's emphasis on slow-cooked, nourishing foods.
- Braised Chicken with Chestnuts (板栗烧鸡): A popular seasonal dish combining chicken with local chestnuts.

Marketing Opportunities

For poultry meat and related products exporters, the following trade shows offer valuable market promotion opportunities.

Event Name	Date	Location	Website
SIAL China	May 18-20, 2026	Shanghai	www.sialchina.com
Food & Hospitality China	November 10-12, 2026	Shanghai	www.fhcchina.com
Food Ingredients China	March 17-19, 2027	Shanghai	https://fic.cfaa.cn
China International Import Expo	November 5-10, 2026	Shanghai	https://www.ciie.org/zbh/en/

Related GAIN Reports

China: Poultry and Products Annual 2025 (Link)

Attachments:

No Attachments.