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## **Report Name:** Poultry and Products Annual

**Country:** Japan

**Post:** Tokyo

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### **Report Highlights:**

FAS/Tokyo forecasts Japan's chicken market to remain stable in 2026, with modest growth in imports driven by steady demand and evolving challenges. Production is expected to match 2025 levels, as rising costs—due to yen depreciation, high feed prices, and biosecurity measures—limit expansion. Consumption remains strong, with inflation shifting demand from higher-priced thigh meat to more affordable breast meat. The food service sector has rebounded, supported by record-breaking foreign tourist arrivals. Imports, especially prepared chicken products, are expected to rise further, addressing labor shortages and growing demand for processed chicken products.

## Summary

FAS/Tokyo expects Japan's chicken market in 2026 to remain resilient, supported by stable production, strong demand, and increased reliance on imports. Production is forecast to remain at 2025 levels as rising costs—due to yen depreciation, high feed prices, and biosecurity needs—limit expansion. Consumption remains strong, with inflation shifting demand from higher-priced thigh meat to more affordable breast meat. Imports are expected to increase in 2026 to diversify supply sources and address labor shortages in Japan's chicken processing sector.

## Chicken

**Table 1: Production, Supply and Distribution of Chicken**

Meat, Chicken Market Year Begins  Japan	2024		2025		2026	
	Jan 2024		Jan 2025		Jan 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks (1000 MT)	149	149	165	165	0	160
Production (1000 MT)	1,815	1,815	1,835	1,830	0	1,835
Total Imports (1000 MT)	1,143	1,143	1,145	1,115	0	1,130
Total Supply (1000 MT)	3,107	3,107	3,145	3,110	0	3,125
Total Exports (1000 MT)	5	5	5	5	0	5
Human Consumption (1000 MT)	2,937	2,937	2,980	2,945	0	2,950
Other Use, Losses (1000 MT)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT)	2,937	2,937	2,980	2,945	0	2,950
Total Use (1000 MT)	2,942	2,942	2,985	2,950	0	2,955
Ending Stocks (1000 MT)	165	165	160	160	0	170
Total Distribution (1000 MT)	3,107	3,107	3,145	3,110	0	3,125
(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

Note: New Post is not Official USDA Data

**Production: Stable Output Amid Rising Costs and Biosecurity Challenges**

FAS/Tokyo forecasts that Japan’s chicken production in 2026 will remain at the same level as 2025. While producers note that demand for chicken remains strong in both household consumption and the food service industry, production costs including feed costs, stay at a high level (Figure 1). This is due to the depreciation of the yen (Figure 2), which has kept the prices of imported feed and other production inputs high, as well as the need to establish high levels of biosecurity to prevent outbreaks of Highly Pathogenic Avian Influenza (HPAI).

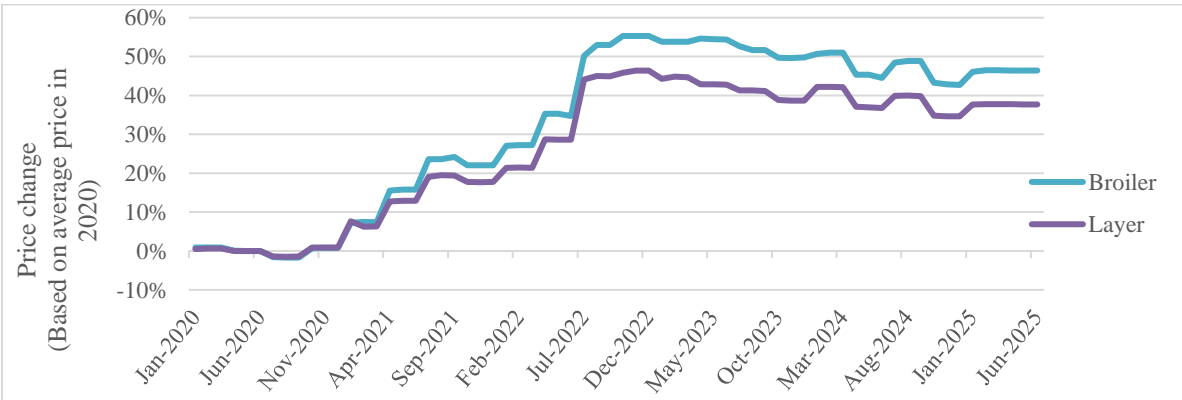
Some producers are modernizing facilities and expanding production capacity as part of rebuilding aging infrastructure. Others, however, are ceasing production due to the inability to absorb rising costs. As a result, Japan’s overall chicken production is expected to remain stable rather than expand.

From January to July 2025, Japan’s chicken production was on par with the same period in 2024, according to the Agriculture and Livestock Industries Corporation (ALIC) (Table 2). Although some regions experienced production declines due to culling following HPAI outbreaks confirmed between late 2024 and January 2025, the impact on broiler production was minimal.

HPAI broke out severely in Japan during the 2024 winter season, beginning on October 17, 2024, and primarily affected egg-laying birds. A total of 9.32 million birds were culled, with 90 percent being laying hens and seven percent broilers. The summer season in 2025 saw historically high temperatures, which caused significant variations in weight gain among broilers, contributing to differences in production volumes across regions.

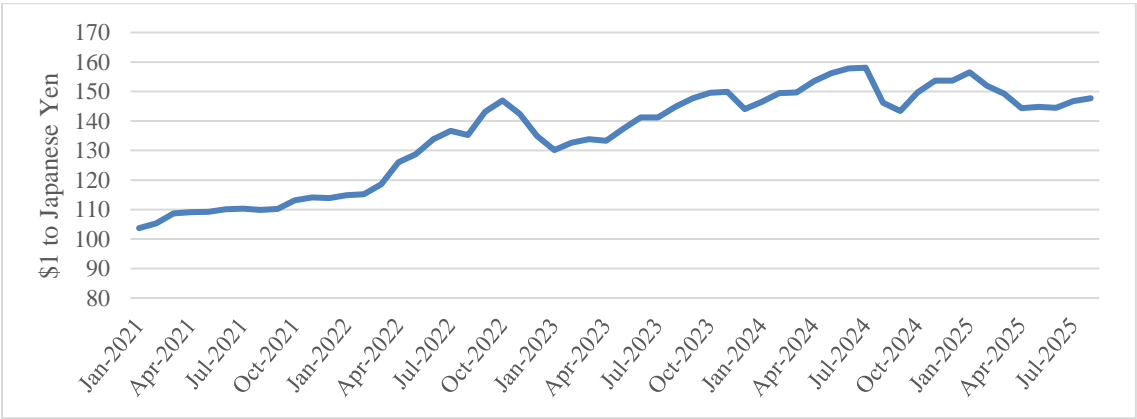
Post expects, however, that the rate of weight gain will return to normal levels in the latter half of the year. Additionally, farms that experienced HPAI outbreaks last year are anticipated to resume production. If there are no major HPAI outbreaks, the total annual production volume for 2025 is projected to increase compared to the previous year.

**Figure 1: Feed Retail Price Trends for Broiler and Laying Hen**



Source: Ministry of Agriculture, Forestry and Fisheries (MAFF)

**Figure 2: U.S.-Japan Monthly Average Currency Exchange Rate**



Source: Bank of Japan

Table 2: Chicken Production in January – July, Unit: MT	
	Chicken (bone-in)
2024	1,004,917
2025	1,001,739
Change	0%

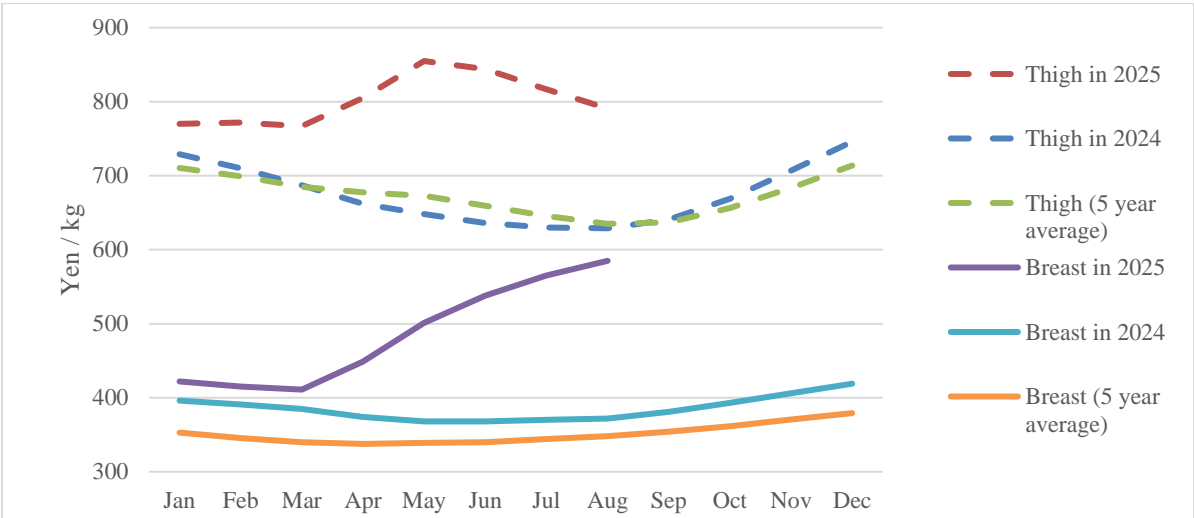
Source: ALIC

**Consumption: High Prices but Stable Demand Amid Food Service Recovery**

FAS/Tokyo forecasts that chicken consumption in Japan will remain steady in 2026, as chicken continues to attract consumers as a high-priority animal protein.

Wholesale prices for domestically produced chicken have remained at historically high levels (Figure 3). In June 2025, the price of boneless thigh meat was 33 percent higher than the same month in the previous year and 28 percent higher than the five-year average. Similarly, the price of breast meat in August was 46 percent higher than the same month last year and 57 percent higher than the five-year average. Amid persistent inflation, cost-conscious consumers and the food service industry appear to be favoring relatively lower-priced animal proteins such as chicken. Within the chicken market, demand is shifting from higher-priced thigh meat to lower-priced breast meat. While the overall high prices are advantageous for chicken production, there are concerns that thigh meat prices have risen too high, negatively affecting sales.

Figure 3: Domestic Broiler Wholesale Prices (Tokyo market)



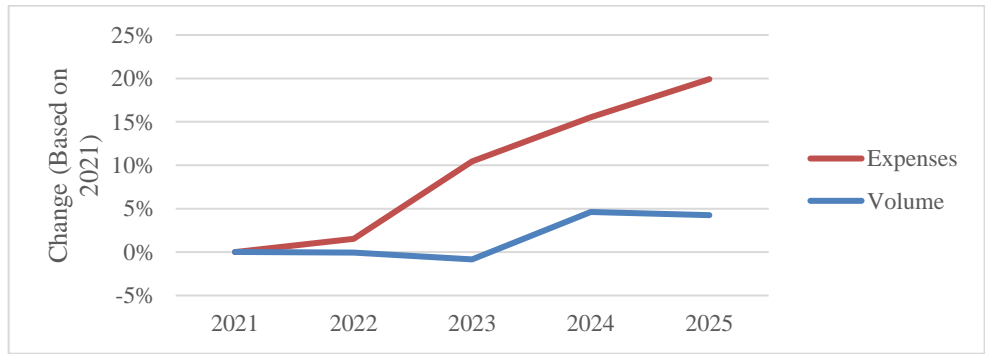
Source:

ALIC

According to household surveys conducted by the Ministry of Internal Affairs and Communications (MIAC), chicken demonstrated low price elasticity in 2025, meaning consumers were compelled to accept higher prices to continue consuming chicken (Figure 4). The increase in retail prices paid by consumers is attributed to the surge in domestic chicken prices as well as rising import costs for chicken. Consumers in Japan are closely monitoring dairy expenses amid ongoing inflation (Figure 5), which is influencing consumption trends in animal protein.

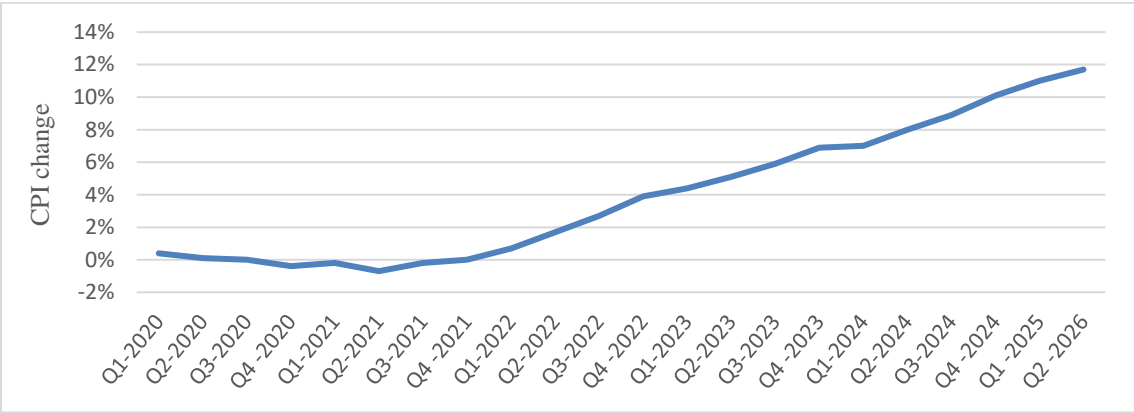
In terms of food service consumption, sales at *Izakaya* (Japanese pubs), where chicken dishes are essential, appear to have finally recovered from the prolonged slump caused by the COVID-19 pandemic. This year’s record-breaking heatwave provided an opportunity for the *Izakaya* industry, which benefited from increased sales of cold alcoholic beverages (Figure 6). Additionally, the number of foreign tourists visiting Japan in 2025 reached historic levels (Figure 7), and chicken, as a highly versatile ingredient, has captured this additional demand in the food service sector.

Figure 4: Trends for Chicken Sales at Retail (Based on 2021)



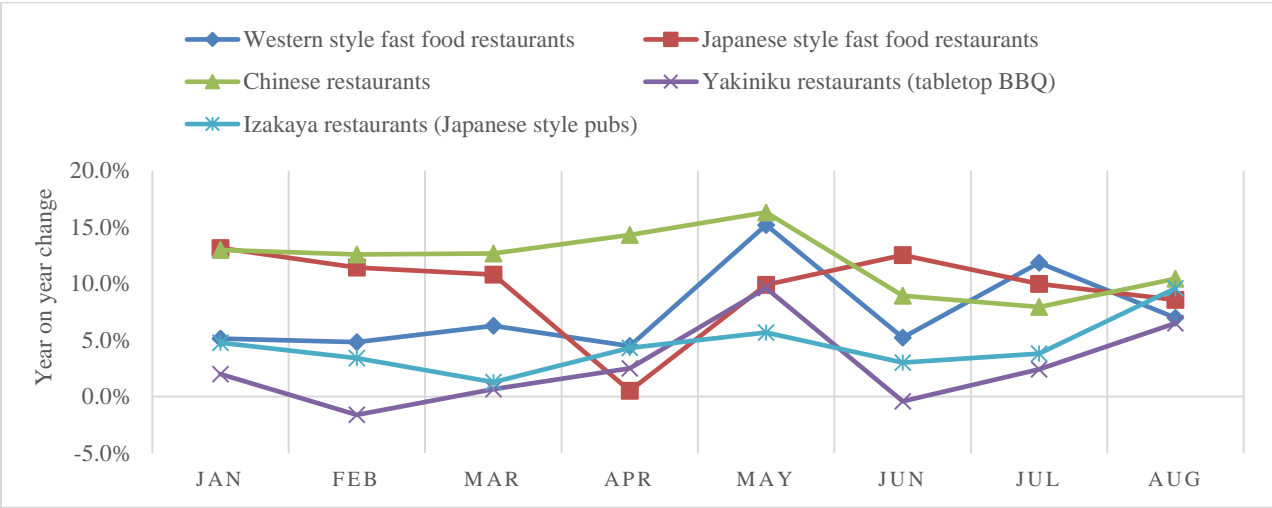
Source: Ministry of Internal Affairs and Communication (MIAC)

Figure 5: Japan’s General Consumer Price Index (CPI), Based on 2020



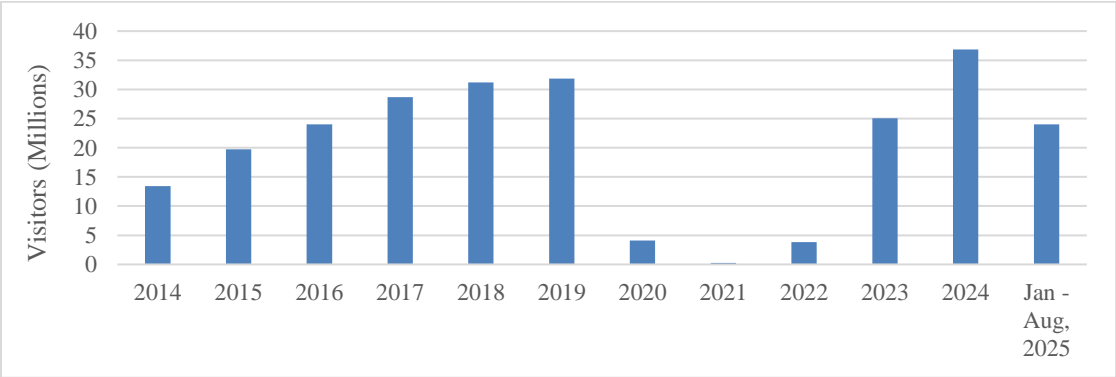
Source: MIAC statistics

Figure 6: Monthly Sales in Food Service Sorted by Restaurant (2025 vs 2024)



Source: Japan Food Service Association

Figure 7: Total Foreign Visitors to Japan (2014 - August 2025)



Source: Japan Tourism Statistics

**Trade: 2026 Increase Driven by HPAI Risks, Stable Production, and Rising Demand for Processed Products**

FAS/Tokyo forecasts that Japan’s chicken imports will increase in 2026, driven by steady domestic demand for chicken. While domestic chicken production remains stable, the ongoing global risk of HPAI outbreaks, including in Japan, suggests that import volumes will rise to diversify supply sources and maintain adequate inventory levels.

In the first eight months of 2025, overall import volumes were down from the same period of 2024 (Table 3), partly due to relatively high inventory levels at the beginning of the year. Imports from Brazil saw a sharp decline compared to the same period last year, as Japan suspended imports from affected states following the confirmation of HPAI outbreaks in May. The United States has also been affected by HPAI outbreaks, resulting in corresponding import suspensions and lower year-to-date exports to Japan. Conversely, imports from Thailand and China, which produce a large volume of processed chicken products for the Japanese market, increased significantly.

In Japan, demand continues to grow for processed and pre-prepared chicken products that can be easily cooked at home. However, the domestic labor shortage, exacerbated by a declining workforce, has created challenges for chicken processing within Japan. As a result, demand for imported processed chicken products is expected to strengthen further in the coming years.

Table 3: Japan’s Chicken Imports in January – August, Unit: Metric Ton			
	January - August		
	2024	2025	Change
<i>Total</i>	<i>749,657</i>	<i>726,263</i>	<i>-3%</i>
Thailand	315,838	324,353	3%
Brazil	305,055	263,711	-14%
China	117,712	126,257	7%
United States	5,868	4,310	-27%
Other	5,184	7,632	47%

Source: Trade Data Monitor, LLC

**Supplemental Table 1:**

Monthly Average Wholesale Prices of Domestic Broiler Cuts, Unit: yen/kg									
Thigh meat									
	2021	2022	% chg.	2023	% chg.	2024	% chg.	2025	% chg.
Jan.	704	661	-6%	818	24%	729	-11%	770	6%
Feb.	700	657	-6%	815	24%	710	-13%	772	9%
Mar.	692	642	-7%	813	27%	687	-15%	767	12%
Apr.	692	633	-9%	808	28%	662	-18%	805	22%
May	670	636	-5%	793	25%	648	-18%	855	32%
Jun.	643	635	-1%	761	20%	636	-16%	844	33%
Jul.	613	646	5%	725	12%	630	-13%	817	30%
Aug.	588	659	12%	694	5%	629	-9%	791	26%
Sep.	585	676	16%	667	-1%	641	-4%		
Oct.	607	708	17%	665	-6%	669	1%		
Nov.	627	740	18%	690	-7%	707	2%		
Dec.	649	781	20%	711	-9%	746	5%		
1st Qtr. Ave.	699	653	-6%	815	25%	709	-13%	770	9%
2nd Qtr. Ave.	668	635	-5%	787	24%	649	-18%	835	29%
3rd Qtr. Ave.	595	660	11%	695	5%	633	-9%		
4th Qtr. Ave.	628	743	18%	689	-7%	707	3%		
Year Ave.	648	673	4%	747	11%	675	-10%		



**Supplemental Table 2:**

<b>Monthly Average Wholesale Prices of Domestic Broiler Cuts, Unit: yen/kg</b>									
<b>Breast meat</b>									
	<b>2021</b>	<b>2022</b>	<b>% chg.</b>	<b>2023</b>	<b>% chg.</b>	<b>2024</b>	<b>% chg.</b>	<b>2025</b>	<b>% chg.</b>
Jan.	318	328	3%	421	28%	396	-6%	422	7%
Feb.	314	321	2%	418	30%	391	-6%	415	6%
Mar.	313	320	2%	419	31%	385	-8%	411	7%
Apr.	314	326	4%	418	28%	374	-11%	449	20%
May	312	331	6%	417	26%	368	-12%	501	36%
Jun.	308	346	12%	417	21%	368	-12%	538	46%
Jul.	312	360	15%	411	14%	370	-10%	565	53%
Aug.	327	370	13%	401	8%	372	-7%	585	57%
Sep.	329	382	16%	389	2%	381	-2%		
Oct.	327	403	23%	384	-5%	393	2%		
Nov.	325	421	30%	390	-7%	406	4%		
Dec.	322	428	33%	393	-8%	419	7%		
1st Qtr. Ave.	315	323	3%	419	30%	391	-7%	416	6%
2nd Qtr. Ave.	311	334	7%	417	25%	370	-11%	496	34%
3rd Qtr. Ave.	323	371	15%	400	8%	374	-6%		
4th Qtr. Ave.	325	417	29%	389	-7%	406	4%		
<b>Year Ave.</b>	<b>318</b>	<b>361</b>	<b>13%</b>	<b>407</b>	<b>13%</b>	<b>385</b>	<b>-5%</b>		

Source: ALIC Monthly Statistics (Quarterly average price is compiled by FAS/Tokyo based on original ALIC monthly data.)

**Supplemental Table 3:**

Japanese Monthly Ending Poultry Stock Estimates											
Unit: MT											
	2020	2021	% chg.	2022	% chg.	2023	% chg.	2024	% chg.	2025	% chg.
Jan.	166,107	156,031	-6	158,303	1	150,021	-5	157,029	5	165,412	5
Feb.	167,710	157,208	-6	163,173	4	153,092	-6	159,005	4	164,934	4
Mar.	170,447	163,802	-4	157,653	-4	153,902	-2	165,978	8	157,013	-5
Apr.	171,702	161,412	-6	147,646	-9	147,050	0	162,563	11	152,405	-6
May	169,368	162,167	-4	146,863	-9	156,845	7	167,304	7	155,156	-7
Jun.	170,786	155,848	-9	149,569	-4	162,211	8	169,774	5	158,611	-7
Jul.	170,149	148,270	-13	150,012	1	160,217	7	169,062	6	155,371	-8
Aug.	167,132	146,306	-12	149,715	2	165,332	10	173,035	5		
Sep.	166,214	141,357	-15	147,061	4	162,546	11	169,672	4		
Oct.	160,947	142,877	-11	152,720	7	160,680	5	173,314	8		
Nov.	157,700	148,227	-6	153,312	3	150,833	-2	170,103	13		
Dec.	151,091	149,901	-1	148,824	-1	149,211	0	164,505	10		

Note: Figures represent the poultry meat estimates. Imported poultry cuts account roughly 80% of ending stocks on average with the majority being broiler meat.

Source: ALIC

#### Attachments:

No Attachments