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Report Highlights:

FAS Manila forecasts 2026 chicken meat production at 1.81 million metric tons (MMT) ready-to-cook, a 7 percent increase from the estimated production in 2025. This growth is expected to be driven by the commercial rollout of a vaccine against Highly Pathogenic Avian Influenza (HPAI), enhanced biosecurity measures adopted by poultry farms, the ongoing impact of African Swine Fever (ASF) on pork supply, and strong performance in the food service sector. Chicken meat imports in 2026 are forecast to reach 560 thousand MT (TMT), supported by the lifting of temporary import bans related to HPAI, sustained consumer demand, and robust economic growth.

Executive Summary

Production: Chicken meat production is forecast to expand 7 percent in 2026, supported by commercial rollout of bird flu vaccine and implementation of other biosecurity measures. The tight pork supply due to the ASF will continue to encourage chicken production. Additionally, the sustained food service sector growth and heightened demand are expected to fuel expansion and improvements in chicken production operations.

Consumption: Chicken meat consumption is forecast to increase 6 percent in 2026, driven by lower retail prices compared to other major animal proteins, increasing consumer preference for healthier protein alternatives, and the wide availability of chicken products. Continued growth in Philippine population and economy will further support higher consumption levels.

Trade: Chicken meat imports are forecast 2 percent higher in 2026 amid strong population growth and the competitive pricing of imported chicken meat. The lifting of temporary trade restrictions related to HPAI and increase in the number of accredited foreign suppliers facilitate greater volumes of chicken meat entering Philippine commerce.

Production

Table 1. Chicken Meat Production, Supply, and Distribution (PS&D) in the Philippines

Meat, Chicken Market Year Begins Philippines	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)	50	50	46	46	0	50
Production (1000 MT)	1560	1560	1630	1690	0	1810
Total Imports (1000 MT)	501	496	510	550	0	560
Total Supply (1000 MT)	2111	2106	2186	2286	0	2420
Total Exports (1000 MT)	0	0	0	0	0	0
Human Consumption (1000 MT)	2065	2060	2146	2236	0	2375
Other Use, Losses (1000 MT)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT)	2065	2060	2146	2236	0	2375
Total Use (1000 MT)	2065	2060	2146	2236	0	2375
Ending Stocks (1000 MT)	46	46	40	50	0	45
Total Distribution (1000 MT)	2111	2106	2186	2286	0	2420
(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

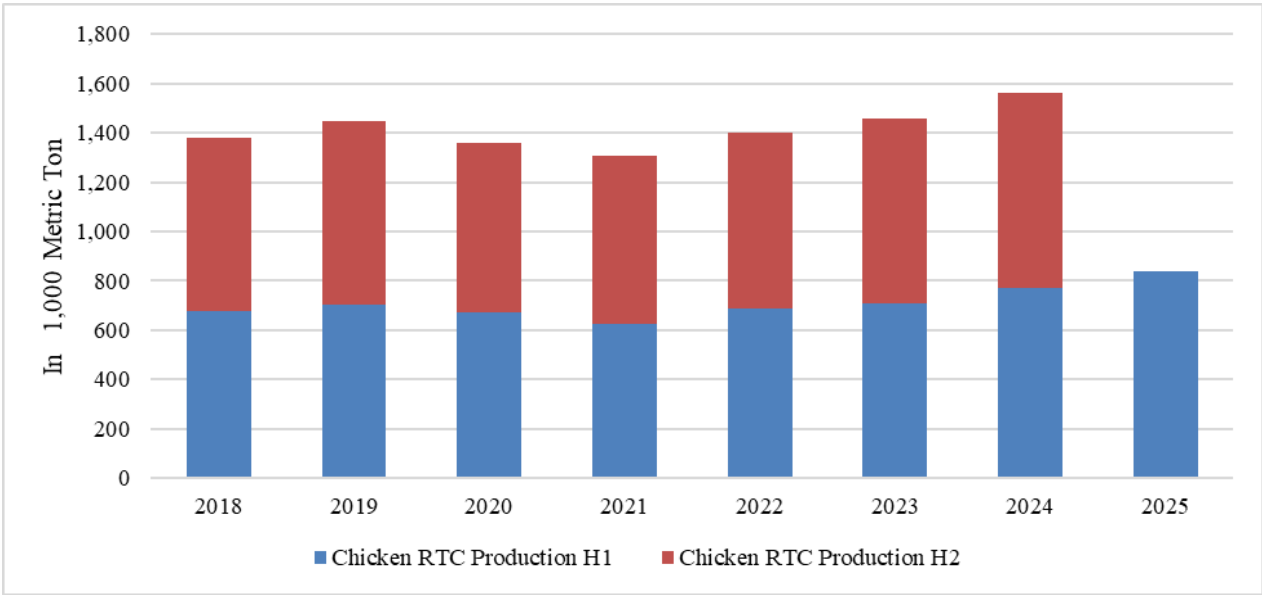
Notes:

1. Not USDA official data.
2. PS&D includes skin and mechanically deboned meat.

FAS Manila forecasts chicken meat production at 1.81 MMT ready-to-cook (RTC) in 2026, up 7 percent from the 2025 estimate. The forecast growth is supported by the commercial rollout of a vaccine against HPAI, combined with enhanced biosecurity measures implemented by poultry farms. Additionally, the tight local pork supply due to the ongoing impact of ASF continues to encourage chicken production. The food service sector's strong performance, including a projected 9 percent compounded annual growth rate (CAGR) in the number of chicken limited-service restaurants from 2024 to 2029, further incentivizes producers to improve operational efficiencies and boost production to meet rising demand.

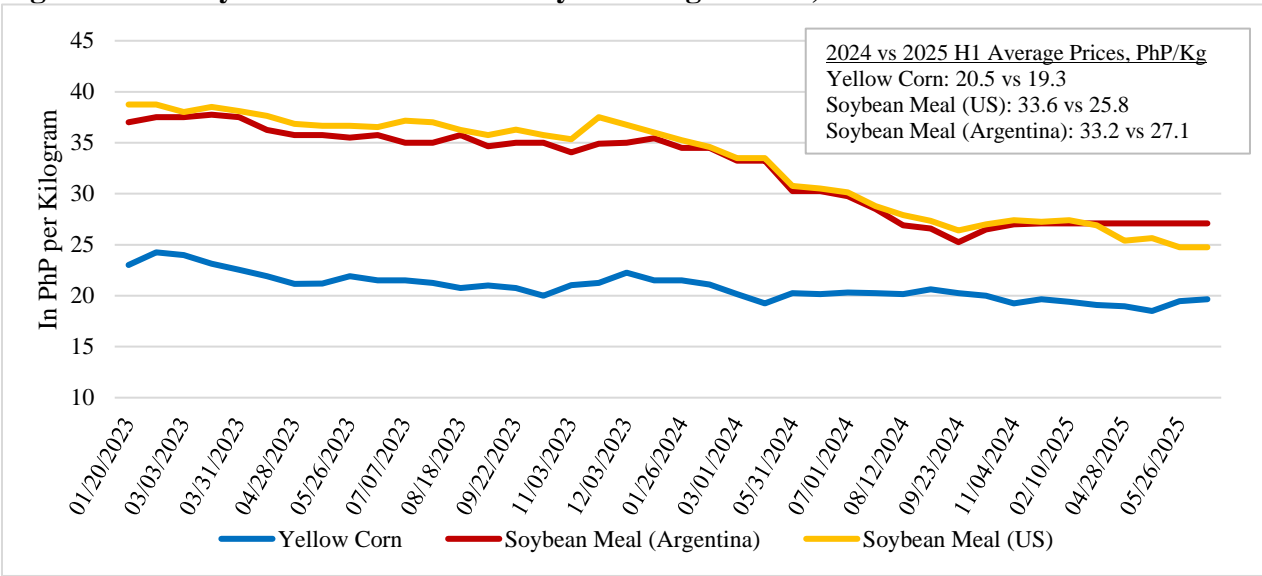
FAS Manila revises upward its 2025 chicken meat production estimate to 1.69 MMT RTC, reflecting higher output during the first half (H1) of the year. According to the [Philippine Statistics Authority](#) (PSA), local chicken meat production grew by approximately 9 percent year-over-year in H1 2025 (**Figure 1**), supported by lower prices of key feed ingredients. Wholesale yellow corn prices declined by 6 percent, while soybean meal prices dropped by 18-23 percent year-over-year during the same period (**Figure 2**). Additionally, industry contacts were able to consistently source day-old-chicks (DOC) from both local producers and traders of imported DOCs, with some citing a record high DOC production this year. Industry data further shows that average DOC prices in August 2025 declined by 34 percent compared to February 2025 (**Figure 3**).

Figure 1. Chicken Meat Production in the Philippines, 2018-H1 2025



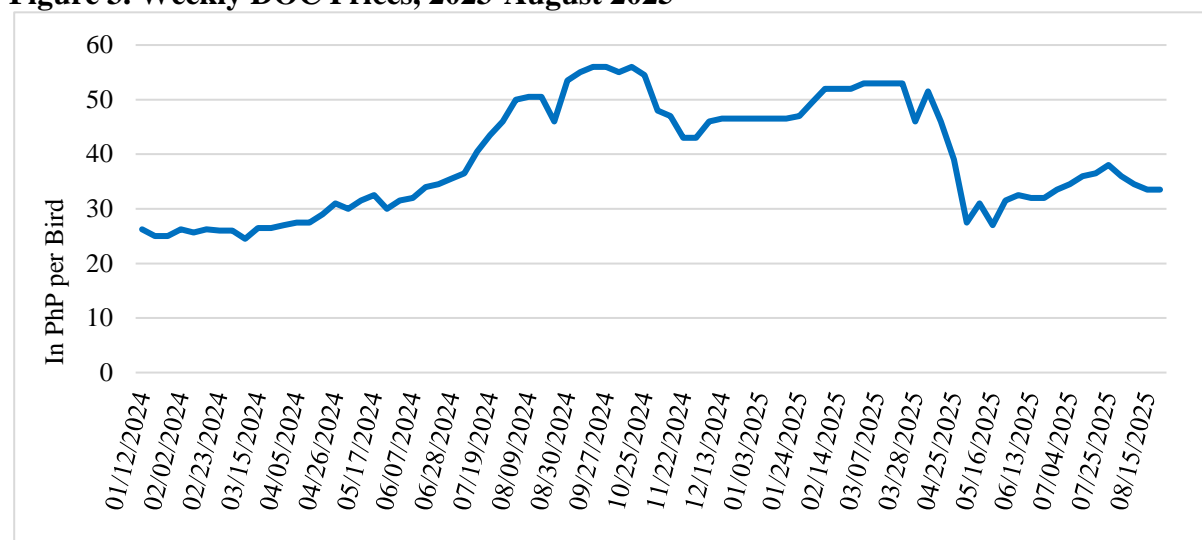
Source of basic data: [PSA](#)
Note: The PSA’s reported liveweight data was converted to RTC using a 75 percent conversion rate.

Figure 2. Weekly Wholesale Prices of Key Feed Ingredients, 2023-June 2025



Source: [Bureau of Animal Industry](#)

Figure 3. Weekly DOC Prices, 2023-August 2025



Source: United Broiler Raisers Association

Commercial rollout of bird flu vaccine and other biosecurity measures bolster chicken output

As of August 22, 2025, data from the Department of Agriculture's (DA) Bureau of Animal Industry (BAI) show that 138 barangays¹ remain affected by HPAI, a 10 percent decrease from the 154 barangays reported in January 2024. According to BAI, no additional positive HPAI cases have been reported in the country since April 2025.

On August 27, 2025, the [Philippine DA](#) announced that the Food and Drug Administration approved the commercial use of Volvac B.E.S.T. (Baculovirus Expressed System Technology) AI plus ND, a German-developed vaccine. This marks the first bird flu vaccine to receive commercial approval in the Philippines since the country's initial bird flu outbreak in [2017](#). According to the DA, Volvac B.E.S.T. provides immunity against HPAI subtype H5N1, the most aggressive subtype of the bird flu virus, which causes high mortality rates in chickens. The vaccine also protects against the most severe form of the Newcastle disease.

The vaccine is complemented by the implementation of other biosecurity measures. Industry contacts, particularly among commercial farms, report adherence to strict hygiene protocols, including footbaths, mandatory showers, and clothing changes within farm premises. Additional measures include downtime regulations to prevent disease transmission from individuals visiting other farms or facilities, regular flock health monitoring, and laboratory testing. Continued adoption of closed poultry facilities equipped with ventilation systems limits exposure of birds to external elements that may cause diseases and disrupt production. According to PSA data as of July 1, 2025, commercial poultry farms accounted for 54 percent of the total chicken inventory in the country, followed by smallhold farms (43%) and semi-commercial farms (3%).

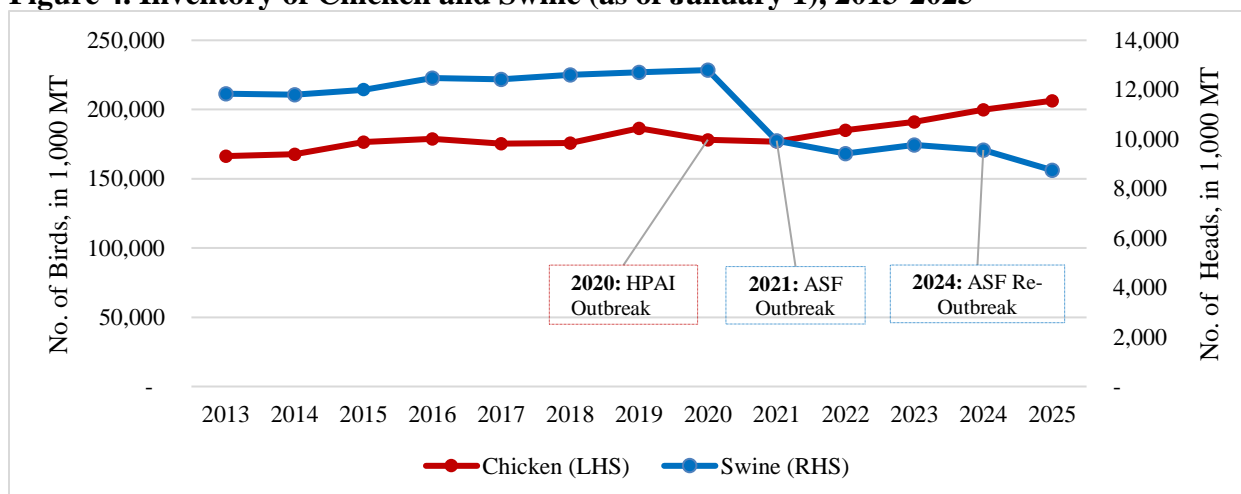
¹A barangay is a Filipino term for a village. It is the smallest political unit in the Philippines.

Tight local swine supply due to ASF encourages chicken production

Industry contacts recognized that ASF's devastating impact on the local swine industry drove pork prices higher and encouraged poultry producers to increase their stocks in response to shifting consumer demand for lower-priced meat alternatives.

According to PSA data, chicken inventory in the country grew by an average of 3 percent annually since the ASF outbreak in 2021 (**Figure 4**). In contrast, hog inventory declined by an average of 3 percent annually over the same period. Farmgate price of broiler chicken has also improved, creating favorable conditions for chicken producers. Meanwhile, the price gap between broiler chicken and hog for slaughter has widened (**Figure 5**). These trends in inventory and farmgate prices are expected to persist as the swine industry has yet to fully recover from the pre-ASF level.

Figure 4. Inventory of Chicken and Swine (as of January 1), 2013-2025

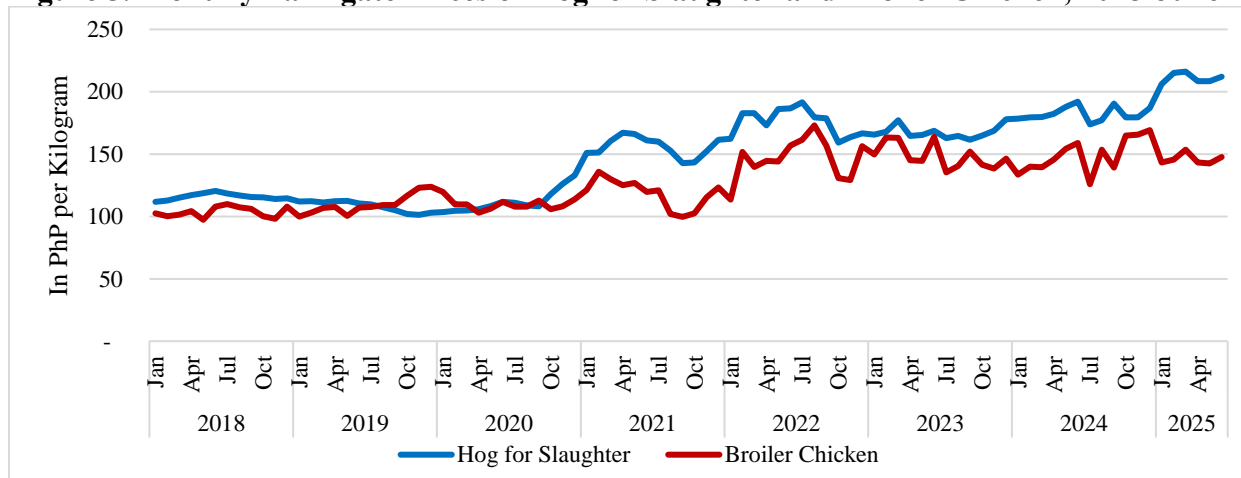


Source: [PSA](#)

Notes:

1. LHS refers to left hand side vertical axis.
2. RHS refers to right hand side vertical axis.

Figure 5. Monthly Farmgate Prices of Hog for Slaughter and Broiler Chicken, 2018-June 2025



Source: [PSA](#)

Sustained food industry growth and heightened demand fuel expansion and improvements in chicken production

According to [Euromonitor International](#), the number of chicken limited-service restaurants, including fast food chains and independent outlets, is forecast to grow by 12.1 percent year-over-year in 2025 and at a CAGR of 8.8 percent from 2024 to 2029.

An international agribusiness company, established in the Philippines, shared their target to double its DOC production by 2026. This expansion will supply chicken for its own brand as well as for a leading fast-food chain in the country. Industry contacts further note that many farms continue to raise chickens under contract growing schemes, not only for limited-service restaurants but also for rotisserie chains scattered across the Philippines. Contract growing provides producers with a stable income stream while supporting sustained production.

Another major industry player revealed plans to expand its production operations by constructing mega poultry farms nationwide. These mega farms support the company's goal of delivering high-quality chicken products such as fresh, frozen, and processed chicken (e.g., marinated and RTC products).

Industry sources also report that tunnel ventilation suppliers have several projects and orders, indicating efforts of producers to upgrade their facilities and enhance productivity. Additionally, there are deliberate efforts to raise larger-sized birds at over 2 kilograms using improved genetics. These contacts primarily sell their produce to wet markets.

Consumption

FAS Manila forecasts 2026 chicken meat consumption to reach 2.38 MMT RTC, up 6 percent from the 2025 estimate. Robust growth in chicken meat consumption is expected to continue, driven by lower retail prices compared to other major animal proteins, increasing consumer preference for healthier alternatives, and the wide availability of chicken products.

Population and economic growth in the Philippines will further support higher meat consumption. According to the [U.S. Census Bureau](#), the population in the country will increase by 1.5 percent year-on-year in 2026. The [Philippine economy](#) is also projected to expand by at least 6.0 percent next year, maintaining its position as among the fastest-growing countries in the Southeast Asian region. The government continues to prioritize ensuring stable supply and affordable prices for key commodities. For 2026, the [Bangko Sentral ng Pilipinas \(BSP\)](#), the country's central bank, projects inflation to settle within the 2.0-4.0 percent target range.

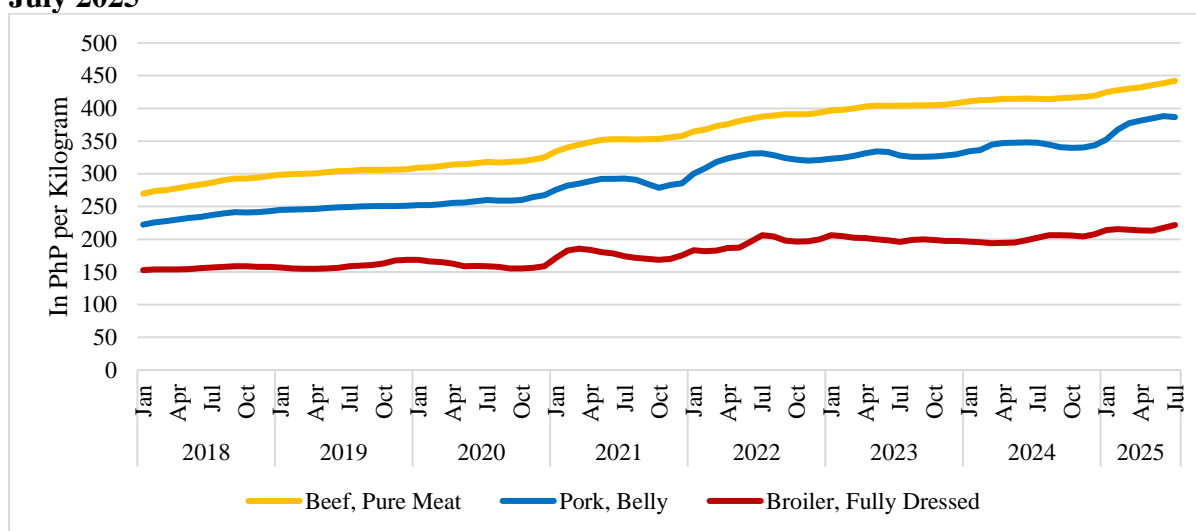
FAS Manila has revised upward its 2025 estimate for chicken consumption, reflecting robust growth in chicken meat production and increased import arrivals. Consumption is further supported by lower inflation in 2025. According to the BSP, inflation this year is projected to average below the lower end of the government's target range.

Lower retail price of chicken versus other major animal protein sources

Chicken meat continues to be the most affordable among major animal protein sources in the Philippines, according to PSA's average retail price data (**Figure 6**). From January 2021 to July 2025, chicken meat prices were approximately 40 percent lower than pork prices, making it a preferred choice especially among the growing middle-income class. The significant price gap between these top animal protein sources highlights the ongoing adverse impact of ASF on the domestic swine sector.

The country's leading fast-food chain continues to offer several value meals priced below PhP100 (USD1.7), catering to cost-conscious consumers. These offerings include a saver meal featuring its popular chicken product, as well as mix-and-match options for other menu items. Similarly, vertically integrated industry contacts report operating multiple meat brands and stores designed to serve various income groups.

Figure 6. Monthly Average Retail Prices of Selected Fresh Meat Products in the Philippines, 2018-July 2025



Source: [PSA](#)

Chicken meat's nutritional value and growing health-conscious consumers

According to Euromonitor International, chicken meat's high-protein and low-fat characteristics align with the increasing number of health-conscious consumers who are actively managing their diets. Euromonitor's 2024 Voice of the Consumer survey for the Philippines also revealed that over 60 percent of respondents are looking for healthy ingredients in food and beverages and targets to become healthier.

Availability of chicken products in various channels and strong food service sector

Industry players' plan to expand locations of fast-food chains and food outlets signal growing demand for chicken meat and facilitating access to chicken products. Euromonitor International reports that the success of chicken-focused fast-food chains has driven growth in limited-service restaurants, which continue to dominate the consumer food service sector in the Philippines. Euromonitor forecasts that the

number of outlets for a major chicken-focused fast-food chain will reach 7,895 in 2026, an increase of nearly 9 percent compared to 2025.

See also FAS Manila's [Food Service - Hotel Restaurant Institutional Annual](#).

Trade

FAS Manila forecasts 2026 chicken meat imports at 560 TMT RTC, a 2 percent increase from the 2025 estimate. The projected growth is driven by rising population demand and the competitive pricing of imported chicken meat. Additionally, the lifting of temporary trade restrictions related to HPAI is expected to facilitate greater volumes of chicken meat entering Philippine commerce. This development is further supported by an increase in the number of accredited foreign suppliers of chicken meat to the Philippines.

FAS Manila has also raised its 2025 chicken meat import estimate to 550 TMT RTC, reflecting updated import data from Philippine trading partners. Notably, the United States recorded a significant increase in shipments during H1 2025 compared to the same period in 2024.

Table 2. Global Chicken Meat Exports to the Philippines, in Metric Ton

Reporter	Calendar Year			January to June		
	2023	2024	% Change	2024	2025	% Change
Total	434,108	495,863	14	244,566	267,699	9
Brazil	219,257	234,811	7	120,154	122,754	2
United States	169,096	163,151	-4	68,254	99,629	46
EU 27	2,845	40,623	1,328	24,022	18,255	-24
Canada	14,328	16,498	15	8,301	4,914	-41
China	12,325	14,422	17	6,669	8,165	22
Chile	3,435	5,637	64	3,378	5,325	58
Thailand	5,218	9,749	87	4,398	6,123	39
Australia	6,437	8,839	37	8,814	-	-
New Zealand	9	1,167	12,867	295	-	-
Others	1,158	966	-17	281	2,534	802

Source: [Trade Data Monitor](#)

Lifting of temporary import bans due to HPAI

As of August 1, 2025, the Philippine DA has lifted trade restrictions on poultry products from several countries previously affected by HPAI. Countries now permitted to resume poultry exports to the Philippines include Australia, Japan, Brazil, the Netherlands, France, and six U.S. states (i.e., Indiana, Maryland, Missouri, New York, Ohio, and Pennsylvania).

Brazil's chicken meat export volumes to the Philippines slowed significantly in July 2025 due to a two-month import ban imposed following a bird flu outbreak. Latest data show that Brazil's chicken meat

exports to the Philippines totaled only 798 MT in July, the lowest monthly volume recorded since Brazil received system accreditation to export pork, beef, and poultry meat to the Philippines under [Department Order No. 3](#) in March 2024.

With the lifting of the import ban in early July 2025, Brazilian chicken meat exports are expected to rebound in the coming months. According to the Trade Data Monitor, Brazil’s chicken meat exports to the Philippines reached 19,747 MT in August 2025, a 2,375 percent month-over-month increase. Brazil is projected to remain the largest supplier of chicken meat to the Philippines in 2026. Data from [BAI](#) shows that over 60 percent of chicken imports from Brazil consist of mechanically deboned meat (MDM), a key ingredient in processed meat products. Under [Executive Order No. 62 \(2024\)](#), the tariff on MDM has been reduced to 5 percent until 2028, facilitating imports of this raw material and supporting the country’s food processing sector.

Imports from the United States, the second-largest supplier of chicken meat to the Philippines, are also expected to increase in 2025 and 2026. The resumption of exports from six U.S. states will further boost import volumes. The Philippines primarily imports its chicken leg quarters from the United States.

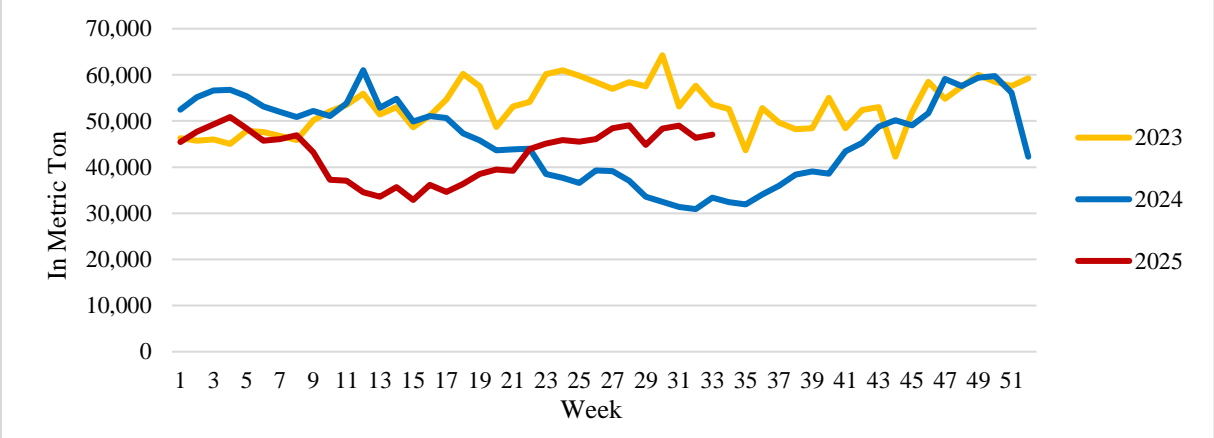
Additional accredited foreign poultry meat exporters to the Philippines

In addition to Brazil, the Philippine DA has recently granted systems accreditation to Argentina, Poland, and Hungary. Selected meat establishments from Russia (17 establishments) and Portugal (6 establishments) are authorized to export poultry meat to the Philippines. These new accreditations are expected to diversify the country’s poultry meat supply.

Stock

Frozen chicken stocks in accredited cold storage warehouses in 2025 are generally lower than in 2023 (Figure 7). A typical buildup of stocks is expected ahead of the November and December holiday season. However, FAS Manila forecasts that ending stocks in 2026 will be 45 TMT, lower than the previous year due to strong demand relative to local supply.

Figure 7. Weekly Frozen Chicken Meat Inventory



Source: National Meat Inspection Service
Note: Excludes mechanically deboned meat.

Policy

The Philippines is evaluating applications from countries seeking recognition for regionalization, a process that limits import bans to specific HPAI-affected areas rather than imposing a total country ban. On May 2, 2025, the Philippine DA issued [Administrative Circular No. 9](#), which outlines guidelines for assessing an accredited country's application for HPAI regionalization.

The evaluation process will follow the World Organization for Animal Health's Terrestrial Animal Health Code, which defines subpopulations of distinct health status within a territory for the purposes of disease control and international trade. This approach aims to facilitate trade while maintaining biosecurity measures to prevent the spread of HPAI.

Attachments:

No Attachments