United States Department of Agriculture
Foreign Agricultural Service
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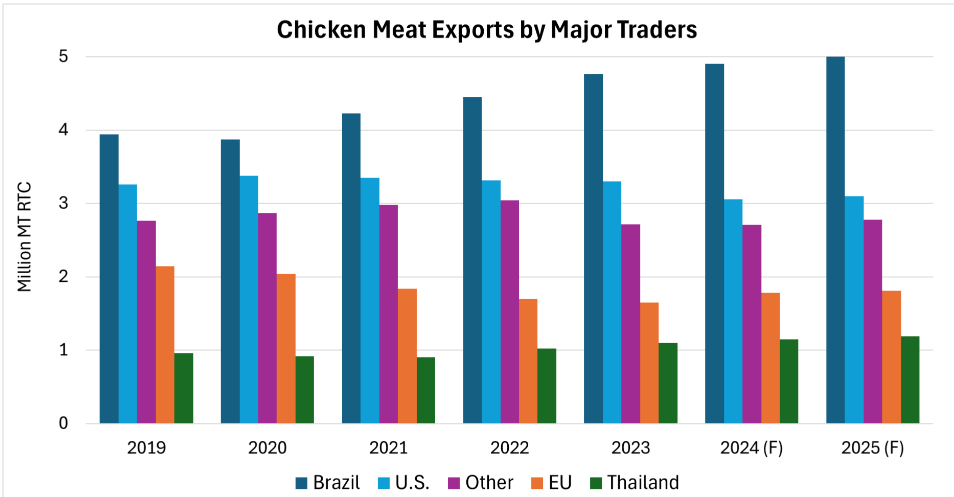
Livestock and Poultry: World Markets and Trade

Brazil Continues to Dominate Growth in Global Chicken Meat Exports in 2025



Following 2 years of relatively stagnant trade, world chicken meat exports are forecast to rise 2 percent in 2025 to reach a record 13.8 million tons. While this growth is supported by several major suppliers, Brazil expansion buoys a large portion due to its expected record level shipments. The 2025 forecast follows the recent trend (since the COVID pandemic) by which Brazil share of world trade continues to increase largely at the expense of the United States and the EU.

Market Shares of Global Trade							
	2019	2020	2021	2022	2023	2024 (F)	2025 (F)
Brazil	30%	30%	32%	33%	35%	36%	36%
U.S.	25%	26%	25%	26%	25%	23%	22%
EU	17%	15%	14%	13%	12%	13%	13%
Thailand	7%	7%	7%	8%	8%	8%	9%
Other	21%	22%	22%	22%	20%	20%	20%

Various Factors Drive Expansion Rates

There is not one predominant factor that drives Brazil exports to climb to a record level. Expansion is propelled by a combination of its disease-free status, export orientation and product offering, as well as competitive pricing. Many of these factors also support increased Thailand exports which are expected to reach record levels.

Disease-Related Restrictions

Brazil continues to maintain its status as free from highly pathogenic avian influenza (HPAI) as outbreaks have been limited to wild birds and backyard flocks, with no cases in commercial operations. As a result, there has been no impact on production or trade restrictions imposed by key markets. Similarly, Thailand has not experienced a case of commercial HPAI since 2009. While recent outbreaks of HPAI in commercial operations in the United States and the EU have had minimal impacts on production, lingering HPAI-related trade restrictions continue to constrain shipments to several markets.

In July 2024, Brazil confirmed an outbreak of Newcastle disease (NCD) in a commercial operation in Rio Grande do Sul (RGS) – its first case since 2006 (backyard case). The impact on production was negligible and trade restrictions were largely resolved within 1 month. Lingering restrictions may limit exports from Rio Grande do Sol but do not have an impact on total Brazil shipments as exporters will source from states with eligible supplies. Rio Grande do Sol accounts for approximately 11 percent of Brazil chicken meat production.

Producing to Export: Orientation and Product Offering

Brazil and Thailand direct a greater portion of production to exports compared to the United States and the EU. Thus, Brazil and Thailand are producing for export rather than primarily for their domestic markets. Export orientation is only feasible if a country can offer the range of products demanded by foreign markets. Several key global markets import a broad variety of products such as breast meat, whole birds, deboned meat, prepared products, etc. Thus, growth in U.S. shipments is generally limited as domestic demand for breast meat constrains the range of products for export. Nearly 60 percent of U.S. broiler meat exports in 2023 were frozen leg and leg quarters, generally bone-in. Similarly, specific requirements by several key markets such as feed use (vegetarian) and religious-based slaughter are also challenging for the domestically orientated U.S. industry to fulfill.

Exports as a Percent of Production

Country	2019	2020	2021	2022	2023	2024 (F)	2025 (F)
Brazil	29	28	29	31	32	33	33
EU	20	18	17	16	15	16	16
Thailand	29	28	28	31	32	33	33
U.S.	16	17	16	16	16	14	14

Costs of Production

As a major producer of both corn and soybean meal, Brazil has a competitive advantage when producing chicken meat due to lower feed costs (Feed accounts for two-thirds of Brazil production costs). The United States also has ample feed supplies and competitive feed prices, but feed costs are higher than those of Brazil. In addition, labor costs in Brazil are significantly lower compared to the United States. Competitive labor costs enable the shipment of products such as de-boned meat.

Brazil to Capture Key Import Demand Growth in 2025

Brazil exports are forecast to increase 100,000 tons (2 percent) in 2025 compared to only 40,000 tons (1 percent) for the United States. The greatest increases in imports are expected for Mexico, Saudi Arabia, Singapore, the United Arab Emirates, and the United Kingdom – all of which are markets that Brazil services and can strongly compete against other potential suppliers on price and product offering. These top growth import markets in 2025, except Mexico, are not significant U.S. markets which constrains U.S. expansion. In addition, Brazil is expected to continue to erode U.S. market share in several of its key markets also due to price-competitiveness and greater product offerings.

Additional and detailed information about the Brazil chicken meat production and trade forecast is available in the USDA FAS GAIN Report: Brazil: Poultry and Products Annual.

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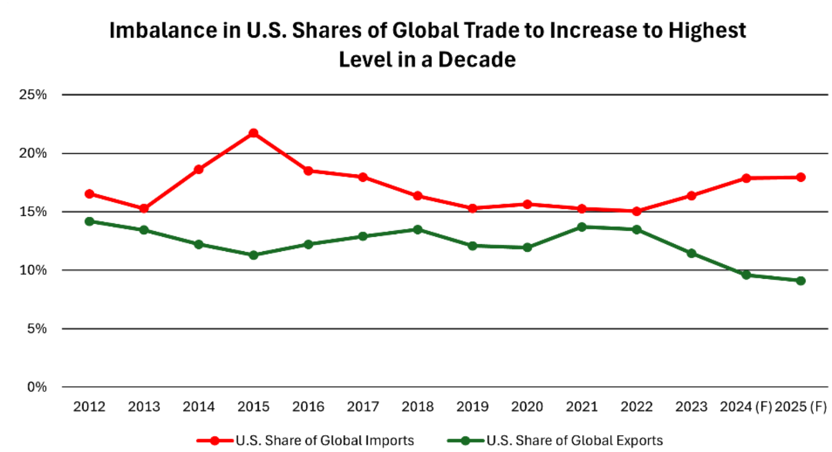
Beef and Veal

Global production in 2025 is forecast down 1 percent to 60.9 million tons as declines in Brazil, the EU, and the United States more than offset increases in Argentina, Australia, India, and Mexico. Australia production is expected to rise 2 percent to a record 2.6 million tons as increased global demand, particularly from the United States, supports higher slaughter. Carcass weights are expected to decline as female cattle slaughter increases to meet export demands. Increased Argentina production is driven by higher international demand and newly implemented domestic policies, which seek to incentivize shipments by reducing export taxes on certain beef products. Production in Brazil is forecast to decline 1 percent to 11.8 million tons as herd contraction continues for a second consecutive year. EU production is expected to decline 2 percent as the combination of economic headwinds and an uncertain regulatory environment continues to disincentivize investment in an already constrained cattle sector.

Global exports in 2025 are forecast virtually unchanged to 12.9 million tons as lower exports from Canada, the EU, and the United States offset greater shipments from Argentina, Australia, and India. Excluding the United States, global exports are anticipated to increase 1 percent. Brazil and Australia, the world's two leading exporters, will capture increased market share at the expense of the United States and the EU, where beef production is expected to decline. Australia exports are expected to rise 2 percent to a record 1.9 million tons as tight U.S. supplies and lower production will increase the demand for beef imports, of which Australia is a significant supplier. Global demand in 2025 is also supported by a 1-percent increase in China imports as well as small gains by South Korea, Taiwan, and the United Kingdom.

U.S. production and exports: U.S. beef production is forecast down 4 percent on tighter cattle inventories. The decline in production, especially lean processing beef, coupled with ample exportable supplies in key markets – such as Argentina, Australia, and Brazil – will spur import growth. Imports are forecast to rise 1 percent to a record of 2.0 million tons. Exports are forecast 12 percent lower to 1.2 million tons on tight domestic supplies and competition from Australia, particularly in East Asia.



Beef and Veal Production - Top Countries Summary

1,000 Metric Tons (Carcass Weight Equivalent)

	2020	2021	2022	2023	2024	2025 Oct
Production						
Brazil	9,975	9,750	10,350	10,950	11,850	11,750
China	6,720	6,980	7,180	7,530	7,800	7,780
European Union	6,903	6,883	6,722	6,461	6,600	6,500
India	3,760	4,195	4,350	4,470	4,565	4,635
Argentina	3,170	3,000	3,140	3,280	3,100	3,175
Australia	2,123	1,895	1,878	2,224	2,555	2,615
Mexico	2,079	2,129	2,177	2,215	2,260	2,305
Russia	1,378	1,380	1,350	1,365	1,400	1,385
Canada	1,314	1,385	1,412	1,326	1,315	1,310
South Africa	1,008	996	979	999	1,008	1,028
Others	6,801	7,008	6,900	6,855	6,626	6,601
Total Foreign	45,231	45,601	46,438	47,675	49,079	49,084
United States	12,389	12,734	12,890	12,286	12,298	11,811
Total	57,620	58,335	59,328	59,961	61,377	60,895
Total Dom. Consumption						
China	9,485	9,987	10,662	11,089	11,557	11,587
Brazil	7,486	7,492	7,524	8,108	8,330	8,210
European Union	6,539	6,529	6,468	6,200	6,260	6,195
India	2,476	2,798	2,908	2,918	2,990	2,990
Argentina	2,383	2,350	2,422	2,512	2,281	2,317
Mexico	1,898	1,938	1,945	2,080	2,210	2,220
Russia	1,708	1,628	1,597	1,592	1,652	1,636
Japan	1,295	1,263	1,228	1,227	1,229	1,217
United Kingdom	1,161	1,132	1,156	1,146	1,160	1,140
Canada	1,046	1,002	1,043	1,001	1,001	990
Others	8,041	8,091	7,835	7,814	7,922	8,000
Total Foreign	43,518	44,210	44,788	45,687	46,592	46,502
United States	12,531	12,717	12,799	12,637	12,959	12,657
Total	56,049	56,927	57,587	58,324	59,551	59,159

Notes: Includes meat of other bovines for certain countries. India includes carabeef (water buffalo). The notation of a month beneath a year conveys the month in which the forecast for that year was released.

Beef and Veal Trade - Top Countries Summary

1,000 Metric Tons (Carcass Weight Equivalent)

	2020	2021	2022	2023	2024	2025 Oct
Total Imports						
China	2,781	3,024	3,502	3,577	3,775	3,825
Japan	832	807	777	702	725	720
Korea, South	549	588	595	595	570	575
United Kingdom	399	393	400	384	400	415
European Union	350	321	372	363	370	355
Chile	342	464	350	356	355	350
Russia	363	298	295	275	300	295
Saudi Arabia	148	170	176	220	260	265
Canada	249	212	214	241	270	255
Egypt	230	300	270	245	245	250
Others	1,926	1,841	1,740	1,675	1,867	1,868
Total Foreign	8,169	8,418	8,691	8,633	9,137	9,173
United States	1,515	1,517	1,538	1,690	1,988	2,007
Total	9,684	9,935	10,229	10,323	11,125	11,180
Total Exports						
Brazil	2,539	2,320	2,898	2,897	3,575	3,600
Australia	1,473	1,291	1,238	1,560	1,865	1,900
India	1,284	1,397	1,442	1,552	1,575	1,645
Argentina	801	658	725	771	820	860
New Zealand	634	685	643	682	675	685
European Union	714	675	626	624	710	660
Canada	511	593	583	572	585	580
Uruguay	411	556	513	483	500	485
Paraguay	371	434	462	441	470	450
Mexico	343	363	398	338	290	310
Others	788	822	783	742	567	590
Total Foreign	9,869	9,794	10,311	10,662	11,632	11,765
United States	1,338	1,555	1,608	1,378	1,340	1,179
Total	11,207	11,349	11,919	12,040	12,972	12,944

Notes: Includes meat of other bovines for certain countries. Indian exports are carabeef (water buffalo). The notation of a month beneath a year conveys the month in which the forecast for that year was released.

Cattle Stocks - Top Countries Summary

(in 1,000 head)

	2020	2021	2022	2023	2024	2025 Oct
Total Cattle Beg. Stks						
India	303,200	305,500	306,700	307,400	307,420	307,490
Brazil	190,026	193,195	193,780	194,365	192,572	186,875
China	91,383	95,621	98,172	102,160	105,090	104,000
European Union	77,161	76,551	75,705	74,808	73,745	72,300
Argentina	54,461	53,540	53,400	54,100	52,800	53,200
Australia	23,655	23,021	23,944	25,800	27,071	27,020
Mexico	16,900	17,000	17,314	17,763	17,840	17,735
Russia	18,022	17,953	17,798	17,435	17,160	16,650
Uruguay	11,436	11,966	11,646	11,795	11,366	11,805
Canada	11,540	11,515	11,515	11,245	11,025	10,935
Others	38,004	38,040	38,309	38,055	29,097	28,681
Total Foreign	835,788	843,902	848,283	854,926	845,186	836,691
United States	93,768	93,587	91,789	88,841	87,157	86,000
Total	929,556	937,489	940,072	943,767	932,343	922,691
Production (Calf Crop)						
India	69,400	69,800	70,000	70,200	70,580	71,030
China	51,900	50,525	53,240	54,138	52,500	52,000
Brazil	49,150	46,550	47,836	48,000	47,500	47,800
European Union	25,280	25,050	24,650	23,720	23,480	23,300
Argentina	14,300	14,460	15,100	14,700	14,800	14,800
Australia	8,300	8,200	8,760	9,500	9,500	10,000
Mexico	8,000	8,150	8,350	8,475	8,600	8,700
Russia	6,660	6,600	6,525	6,475	6,350	6,300
New Zealand	5,135	5,460	5,159	5,120	5,100	5,000
Canada	4,435	4,482	4,427	4,341	4,310	4,280
Others	12,404	11,974	11,871	11,079	9,680	9,305
Total Foreign	254,964	251,251	255,918	255,748	252,400	252,515
United States	35,501	35,131	34,440	33,593	32,800	32,700
Total	290,465	286,382	290,358	289,341	285,200	285,215

Notes: May contain other bovines. The notation of a month beneath a year conveys the month in which the forecast for that year was released.

Cattle Trade - Top Countries Summary
(in 1,000 head)

	2020	2021	2022	2023	2024	2025 Oct
Total Imports						
Canada	277	402	317	294	300	250
China	266	361	350	148	85	80
United Kingdom	59	18	33	33	35	35
Mexico	37	101	112	57	35	30
Russia	70	56	30	15	6	6
Others	341	233	224	186	9	7
Total Foreign	1,050	1,171	1,066	733	470	408
United States	2,114	1,775	1,628	1,981	2,175	2,050
Total	3,164	2,946	2,694	2,714	2,645	2,458
Total Exports						
Mexico	1,485	1,037	965	1,295	1,460	1,390
Australia	1,109	788	593	626	775	825
European Union	1,122	1,014	1,077	967	810	800
Canada	675	645	754	734	765	685
Brazil	329	62	195	582	800	515
Others	372	485	307	479	387	422
Total Foreign	5,092	4,031	3,891	4,683	4,997	4,637
United States	321	511	424	352	340	250
Total	5,413	4,542	4,315	5,035	5,337	4,887

Notes: May contain other bovines. The notation of a month beneath a year conveys the month in which the forecast for that year was released.

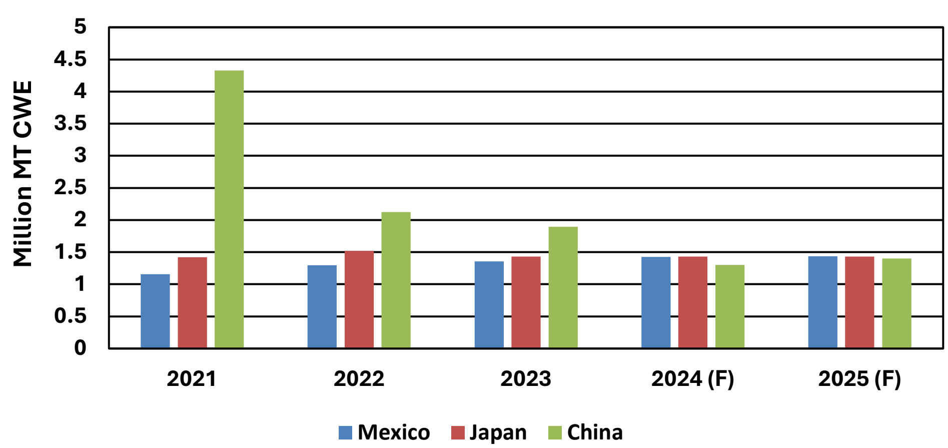
Pork

Global production in 2025 is forecast down 1 percent to 115.1 million tons as lower production in China and the European Union more than offsets production growth in the United States, Vietnam, and Brazil. Vietnam pork production is forecast 3 percent higher to 3.8 million tons on expected herd expansion as the swine sector consolidates and improves management of African swine fever (ASF). Brazil production is forecast 1 percent higher to 4.6 million tons on strong export demand and easing input costs. Despite improved sector profitability in 2024, China pork production is forecast 2 percent lower in 2025 to 55.5 million tons. Reduced sow inventories in 2024 are expected to yield fewer animals available for slaughter in 2025. Additionally, China consumer demand for pork is expected to remain weak given continued economic uncertainty and the growing consumer preference for poultry. European Union production is forecast 2 percent lower to 20.9 million tons due to expected lower hog prices.

Global exports are forecast to increase 1 percent to 10.4 million tons in 2025 as export growth from the United States and Canada offsets lower exports from the EU. Canada exports are forecast 1 percent higher to 1.5 million tons with stable demand from the United States and continued growth to several Asian markets, including Japan and South Korea. EU exports are forecast 2 percent lower to 2.95 million tons given expected lower available supplies for export and ongoing ASF-related trade restrictions.

U.S. production and exports: U.S. production is forecast 2 percent higher in 2025 to 12.9 million tons on growth in slaughter and pigs per litter. Improved sector profitability in 2024 and reduced feed costs are expected to continue to support heavier hog weights. U.S. exports are forecast to increase 3 percent in 2025 to 3.4 million tons given ample domestic supplies and strong export price competitiveness. Despite increased competition from Brazil, Mexico will remain a core market for U.S. exports. Additionally, U.S. exports are expected gain market share from the EU in South Korea and Australia.

Top Pork Importers: Mexico and Japan Expected Larger than China



Pork Production - Top Countries Summary

1,000 Metric Tons (Carcass Weight Equivalent)

	2020	2021	2022	2023	2024	2025 Oct
Production						
China	36,340	47,500	55,410	57,940	56,750	55,500
European Union	23,219	23,615	22,277	20,829	21,250	20,900
Brazil	4,125	4,365	4,350	4,450	4,495	4,550
Russia	3,611	3,700	3,910	4,000	4,140	4,280
Vietnam	2,930	3,112	3,313	3,549	3,655	3,765
Canada	2,115	2,101	2,078	2,106	2,085	2,125
Mexico	1,451	1,484	1,530	1,557	1,590	1,615
Korea, South	1,403	1,407	1,419	1,435	1,450	1,450
Japan	1,306	1,318	1,293	1,293	1,320	1,325
Philippines	1,115	1,000	1,020	1,050	1,040	1,060
Others	5,600	5,790	5,765	5,701	5,559	5,619
Total Foreign	83,215	95,392	102,365	103,910	103,334	102,189
United States	12,845	12,560	12,252	12,391	12,684	12,941
Total	96,060	107,952	114,617	116,301	116,018	115,130
Total Dom. Consumption						
China	41,517	51,724	57,434	59,741	57,952	56,800
European Union	18,203	18,720	18,220	17,813	18,360	18,060
Russia	3,468	3,558	3,758	3,815	3,926	4,048
Vietnam	3,068	3,276	3,413	3,651	3,743	3,865
Brazil	2,949	3,047	3,033	3,038	3,012	3,067
Mexico	2,052	2,320	2,544	2,653	2,775	2,810
Japan	2,732	2,760	2,765	2,739	2,750	2,755
Korea, South	1,976	1,997	2,072	2,109	2,212	2,252
Philippines	1,268	1,430	1,545	1,522	1,573	1,579
United Kingdom	1,430	1,506	1,559	1,492	1,525	1,530
Others	6,528	6,968	7,007	7,059	6,765	6,882
Total Foreign	85,191	97,306	103,350	105,632	104,593	103,648
United States	10,034	9,919	9,957	9,829	9,991	10,134
Total	95,225	107,225	113,307	115,461	114,584	113,782

Note: The notation of a month beneath a year conveys the month in which the forecast for that year was released.

Pork Trade - Top Countries Summary
1,000 Metric Tons (Carcass Weight Equivalent)

	2020	2021	2022	2023	2024	2025 Oct
Total Imports						
Mexico	945	1,155	1,299	1,354	1,425	1,435
Japan	1,412	1,420	1,523	1,431	1,430	1,430
China	5,277	4,328	2,125	1,897	1,300	1,400
Korea, South	554	570	713	675	785	795
United Kingdom	792	727	779	757	755	745
Philippines	168	462	561	448	505	510
Hong Kong	378	364	251	259	265	280
Canada	274	263	234	261	245	240
Australia	201	210	241	195	220	225
Colombia	89	151	165	160	190	195
Others	1,113	1,306	1,295	1,246	1,168	1,224
Total Foreign	11,203	10,956	9,186	8,683	8,288	8,479
United States	410	535	610	518	539	547
Total	11,613	11,491	9,796	9,201	8,827	9,026
Total Exports						
European Union	5,176	4,993	4,179	3,125	3,000	2,950
Brazil	1,178	1,321	1,319	1,414	1,485	1,485
Canada	1,546	1,483	1,416	1,327	1,440	1,450
Chile	295	268	230	263	265	268
Mexico	344	319	285	258	240	240
Russia	156	158	170	200	220	240
United Kingdom	346	256	261	192	185	185
China	100	104	101	96	98	100
Australia	34	38	35	46	50	55
Singapore	8	15	18	15	23	23
Others	85	89	63	61	63	68
Total Foreign	9,268	9,044	8,077	6,997	7,069	7,064
United States	3,302	3,186	2,878	3,095	3,244	3,354
Total	12,570	12,230	10,955	10,092	10,313	10,418

Note: The notation of a month beneath a year conveys the month in which the forecast for that year was released.

Swine Stocks - Top Countries Summary

(in 1,000 head)

	2020	2021	2022	2023	2024	2025 Oct
Total Beginning Stocks						
China	310,410	406,500	449,220	452,560	434,220	405,000
European Union	143,146	145,911	141,681	134,410	132,856	132,700
Brazil	37,850	37,350	35,688	34,250	33,150	34,080
Russia	25,048	25,744	26,200	26,000	27,500	29,000
Canada	14,065	14,120	14,170	13,900	13,975	14,180
Mexico	11,050	11,500	11,775	12,250	12,700	12,895
Korea, South	11,280	11,078	11,217	11,124	11,089	10,954
Japan	9,090	9,290	8,949	8,956	8,798	8,900
Ukraine	5,842	5,986	5,718	5,058	5,204	5,160
United Kingdom	4,741	4,828	5,100	4,650	4,350	4,250
Total Foreign	572,522	672,307	709,718	703,158	683,842	657,119
United States	77,323	77,022	74,606	74,956	75,461	77,625
Total	649,845	749,329	784,324	778,114	759,303	734,744
Production (Pig Crop)						
China	565,000	655,000	712,510	717,249	695,000	700,000
European Union	256,100	254,200	238,760	226,950	231,000	225,000
Russia	55,880	57,300	59,000	60,200	61,825	63,400
Brazil	43,525	44,515	44,850	45,750	48,050	48,100
Canada	29,550	30,211	29,496	30,241	29,750	29,600
Mexico	20,291	20,810	21,700	22,075	22,175	22,400
Korea, South	19,973	20,473	20,389	19,831	19,791	20,130
Japan	17,230	17,000	16,795	16,740	16,800	16,850
United Kingdom	11,250	11,575	10,850	9,650	10,050	10,400
Ukraine	8,569	8,550	8,013	8,375	8,700	8,400
Total Foreign	1,027,368	1,119,634	1,162,363	1,157,061	1,143,141	1,144,280
United States	140,248	133,466	133,602	135,784	137,765	139,995
Total	1,167,616	1,253,100	1,295,965	1,292,845	1,280,906	1,284,275

Notes: The notation of a month beneath a year conveys the month in which the forecast for that year was released.

Swine Trade - Top Countries Summary
(in 1,000 head)

	2020	2021	2022	2023	2024	2025 Oct
Total Imports						
United Kingdom	485	433	418	383	380	380
European Union	19	27	24	13	12	12
Mexico	25	9	6	10	12	12
China	29	23	5	8	8	8
Ukraine	11	7	2	6	7	7
Russia	21	11	5	4	4	4
Canada	6	4	4	3	3	3
Brazil	2	2	2	6	2	2
Japan	3	1	1	1	2	2
Korea, South	1	2	2	4	2	2
Total Foreign	602	519	469	438	432	432
United States	5,293	6,663	6,486	6,745	6,771	6,565
Total	5,895	7,182	6,955	7,183	7,203	6,997
Total Exports						
Canada	5,311	6,673	6,487	6,750	6,780	6,575
European Union	515	964	1,012	975	1,530	1,350
China	718	881	1,066	1,120	1,175	1,275
Russia	55	44	106	47	42	40
United Kingdom	3	2	6	7	5	5
Brazil	3	2	3	3	3	3
Japan	0	0	0	0	0	0
Korea, South	0	0	0	0	0	0
Mexico	0	0	0	0	0	0
Ukraine	4	19	1	0	0	0
Total Foreign	6,609	8,585	8,681	8,902	9,535	9,248
United States	56	52	44	68	68	60
Total	6,665	8,637	8,725	8,970	9,603	9,308

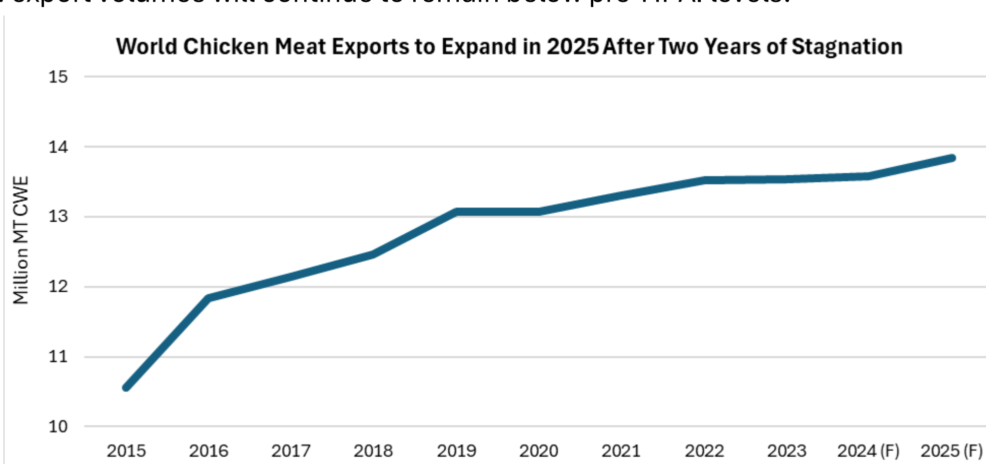
Notes: The notation of a month beneath a year conveys the month in which the forecast for that year was released.

Chicken Meat

Global production is forecast nearly 2 percent higher in 2025 to a record 104.9 million tons. Production gains are forecast for most countries with the largest increases expected for China, the United States, Turkey, the EU, Brazil, and Mexico. Expansion is supported by a modest improvement in feed prices and on consumer demand spurred by economic growth. A significant production increase in China will enable its return to being the world's largest producer. China demand will be generated primarily from white broilers as producers respond to demand drivers and as consumers may substitute broiler meat in place of pork. China yellow broiler production, mainly sold in wet markets, will remain stagnant. Turkish production is forecast to rise on stable domestic demand and increased shipments as government exports restrictions are lifted. Brazil's record high forecast is supported by strong foreign demand and lower expected production costs.

Global exports are forecast 2 percent higher in 2025 to a record 13.8 million tons following relatively stagnant trade in 2023 and 2024. Economic growth is expected to drive moderate consumption growth as chicken remains a lower-cost animal protein which appeals to middle-income consumers. While all major exporters (Brazil, the United States, the EU, and Thailand) will post gains, Brazil will capture the largest share of growth as it is able to service and be price-competitive in the largest growth markets (Mexico, Saudi Arabia, Singapore, the UAE, and the UK). Reductions in highly pathogenic avian influenza (HPAI)-related restrictions will support increased EU exports to various markets although the UK will remain the largest market for the EU. Thailand exports will be supported by growth in cooked chicken, particularly to the EU, Japan, and the UK.

U.S. production and exports: U.S. production is expected to rise 2 percent to a record 21.7 million tons in 2025 as feed prices continue modest declines along with the assumption of no significant disease outbreaks. Increased production will support a slight boost in exports which are forecast 1 percent higher to 3.1 million tons on growth in shipments to Mexico and Canada. However, U.S. shipments to smaller, non-traditional, and price-sensitive markets may decline on increased competition from Brazil. Despite the increase, U.S. export volumes will continue to remain below pre-HPAI levels.



Chicken Meat Production - Top Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

	2020	2021	2022	2023	2024	2025 Oct
Production						
China	14,600	14,700	14,300	14,800	15,000	15,300
Brazil	13,880	14,500	14,465	14,900	15,000	15,100
European Union	11,030	10,840	10,880	11,084	11,385	11,530
Russia	4,680	4,600	4,800	4,800	4,800	4,850
Mexico	3,596	3,665	3,763	3,888	3,985	4,085
Thailand	3,250	3,220	3,300	3,450	3,490	3,580
Turkey	2,136	2,246	2,418	2,330	2,400	2,600
Argentina	2,215	2,290	2,319	2,436	2,485	2,545
Colombia	1,685	1,773	1,893	1,890	1,920	1,950
United Kingdom	1,779	1,841	1,847	1,858	1,900	1,920
Others	20,641	21,272	21,221	21,310	19,297	19,745
Total Foreign	79,492	80,947	81,206	82,746	81,662	83,205
United States	20,255	20,391	20,993	21,082	21,384	21,726
Total	99,747	101,338	102,199	103,828	103,046	104,931
Total Dom. Consumption						
China	15,211	15,031	14,401	15,002	14,830	15,115
European Union	9,651	9,648	9,881	10,157	10,325	10,420
Brazil	10,010	10,279	10,023	10,135	10,105	10,105
Mexico	4,431	4,575	4,666	4,890	4,951	5,070
Russia	4,688	4,632	4,750	4,812	4,850	4,895
Japan	2,757	2,848	2,877	2,845	2,940	2,985
United Kingdom	2,068	2,173	2,484	2,569	2,610	2,640
Thailand	2,323	2,279	2,309	2,332	2,360	2,385
Argentina	2,025	2,116	2,138	2,298	2,320	2,370
Turkey	1,671	1,687	1,772	1,871	2,065	2,250
Others	25,550	26,434	26,716	26,726	24,823	25,331
Total Foreign	80,385	81,702	82,017	83,637	82,179	83,566
United States	16,994	17,170	17,676	17,866	18,412	18,700
Total	97,379	98,872	99,693	101,503	100,591	102,266

Notes: Chicken paws are excluded. The notation of a month beneath a year conveys the month in which the forecast for that year was released.

Chicken Meat Trade - Top Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

	2020	2021	2022	2023	2024	2025 Oct
Total Imports						
Japan	1,005	1,077	1,101	1,063	1,130	1,140
Mexico	842	917	915	1,006	970	990
United Kingdom	732	689	903	935	965	980
European Union	660	647	703	722	720	700
Saudi Arabia	618	615	594	564	600	615
Iraq	468	388	486	529	550	550
China	999	788	633	756	510	495
Philippines	336	437	496	437	480	490
United Arab Emirates	358	384	356	375	385	400
Cuba	262	353	345	314	325	325
Others	4,349	4,441	4,481	4,453	4,361	4,396
Total Foreign	10,629	10,736	11,013	11,154	10,996	11,081
United States	66	72	83	61	69	75
Total	10,695	10,808	11,096	11,215	11,065	11,156
Total Exports						
Brazil	3,875	4,226	4,447	4,767	4,900	5,000
European Union	2,039	1,839	1,702	1,649	1,780	1,810
Thailand	917	907	1,021	1,098	1,150	1,190
China	388	457	532	554	680	680
Ukraine	428	458	419	428	445	450
Turkey	465	559	646	459	335	350
United Kingdom	443	357	266	224	255	260
Russia	216	218	245	220	225	230
Argentina	196	183	194	144	170	180
Chile	136	133	144	105	135	140
Others	599	617	594	580	441	459
Total Foreign	9,702	9,954	10,210	10,228	10,516	10,749
United States	3,376	3,350	3,314	3,302	3,058	3,098
Total	13,078	13,304	13,524	13,530	13,574	13,847

Notes: Chicken paws are excluded. The notation of a month beneath a year conveys the month in which the forecast for that year was released.

Notes to Readers

The *Livestock and Poultry: World Markets and Trade* circular is designed to give a snapshot of the current situation among the major players in world beef, pork, and chicken meat trade.

Thank you to Shayle Shagam for his 25 years as USDA's Livestock, Poultry and Dairy Interagency Commodity Estimate Committee Chairperson. His wisdom, humor, insight and guidance were appreciated and will be missed.

Discontinued Series:

The following PSDs are discontinued as of this publication.

Commodity/Attribute	Series Ending Year	Countries
Cattle	2023	Egypt
Beef	2023	Belarus
Pork	2023	Belarus
Chicken	2023	Belarus, Egypt, Jordan

Assumptions

Diseases: Forecast reflects animal disease policies/restrictions in place as of October 11, 2024, and assumes their continuation.

Trade Actions: This report only considers those trade actions which are in place or have had formal announcement of effective dates as of the time of publication. Further, unless a formal end date is specified, this report also assumes such actions are in place throughout the time period covered by these forecasts.

Technical Notes

CWE/PWE: All quantities (beef and pork) noted are in Carcass Weight Equivalent (CWE) unless otherwise noted as Product Weight Equivalent (PWE). CWE is the weight of an animal after slaughter and removal of most internal organs, head, and skin. PWE is the actual weight of the meat product exported.

RTC (Ready-to-Cook): RTC means any slaughtered poultry free from protruding pinfeathers and vestigial feathers (hair or down), from which the head, feet, crop, oil gland, trachea, esophagus, entrails, and lungs have been removed, and from which the mature reproductive organs and kidneys may have been removed, and with or without the giblets, and which is suitable for cooking without need of further processing. Ready-to-cook poultry also means any cut-up or disjointed portion of poultry or other parts of poultry, such as reproductive organs, head, or feet that are suitable for cooking without need of further processing.

European Union: The term "European Union" means the countries involved in the previous customs union, i.e., EU27+UK, through 2015. Starting with 2016 data, livestock and poultry PSDs reflect EU27 and UK separately.

Conversion Rates and HS Codes

BEEF AND VEAL		
HS Code	**Description**	**Conversion Rate**
020110	Bovine carcasses and half carcasses, fresh or chilled	1.00
020120	Bovine cuts bone in, fresh or chilled	1.00
020130	Bovine cuts boneless, fresh or chilled	1.36
020210	Bovine carcasses and half carcasses, frozen	1.00
020220	Bovine cuts bone in, frozen	1.00
020230	Bovine cuts boneless, frozen	1.36
021020	Bovine meat salted, dried or smoked	1.74
160250	Bovine meat, offal nes, not livers, prepared/preserve	1.79

Notes: Beef and veal estimates include meat of other bovines for certain countries. In particular, India estimates include carabeef (water buffalo). Exports of HS 160250 are partially excluded from Argentina export estimates.

PORK		
HS Code	**Description**	**Conversion Rate**
020311	Carcasses/half-carcasses, fr/ch	1.00
020312	Bone-In hams, shoulders and cuts thereof, fr/ch	1.11
020319	Other pork cuts, fr/ch	1.30
020321	Carcasses/half-carcasses, frozen	1.00
020322	Bone-In hams, shoulders and cuts thereof, frozen	1.11
020329	Other pork cuts, frozen	1.30
021011	Bone-In hams, shoulders and cuts thereof, processed	1.30
021012	Bellies (streaky) and cuts thereof, processed	1.16
021019	Other meat of swine, processed	1.16
160241	Hams and cuts thereof, prep/pres	1.30
160242	Shoulders and cuts thereof, prep/pres	1.30
160249	Other meat of swine including mixtures, prep/pres	1.30

Chicken Meat Trade Codes: Fresh/Chilled (HS 020711 and HS 020713), Frozen (HS 020712 and HS 020714) and Processed (HS 160232). In general, chicken paws are excluded. Trade of "salted poultry" (HS 021099) is included in EU and UK imports as well as the exports of selected countries.

PSD Online

The entire USDA PSD database is available online at: http://www.fas.usda.gov/psdonline.

Additional Resources

- Situation and outlook information on U.S. livestock and poultry can be obtained from the USDA-Economic Research Service at: https://www.ers.usda.gov/topics/animal-products/.

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