

GCC Poultry Meat Market - Size, Share, Covid-19 Impact & Forecasts Up To 2028

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Report description:

The GCC Poultry Meat Market is projected to register a CAGR of 1.76%

Key Highlights

Largest Segment by Form - Fresh / Chilled : Fresh meats are considered to be of higher quality. The relaxation of the lockdown allowed customers to immediately purchase freshly cut meat through an offline channel.

Largest Segment by Country - Saudi Arabia : Saudi consumers favor locally raised fresh chicken. Thus, the local regulatory bodies are encouraging local producers to boost meat production to cater to the surging demand.

Fastest-growing Segment by Form - Frozen / Canned : The consumption value of frozen/canned poultry is led by the on-trade distribution in the region. This is because of its extended shelf life and better distribution bandwidth.

Fastest-growing Segment by Country - Bahrain : The surging demand supported by constant investments to boost the local production of poultry meat is projected to drive the Bahrain market, mainly through off-trade channel.

GCC Poultry Meat Market Trends

On-Trade is the largest segment by Distribution Channel.

The on-trade segment dominates the distribution channels for poultry meat. Almost two-thirds of poultry meat products are consumed in the country through the on-trade segment. Restaurants and hotels are major contributors to the region's economy and were severely affected due to the shutdown of the hospitality sector during the COVID-19 pandemic. Foodservice businesses resorted to delivery platforms to make up for the loss of in-store foot traffic. As a result, food delivery platforms saw significant growth in 2020. Saudi Arabia (173%), the United Arab Emirates (61%), and Bahrain (54%) were the three countries with the most growth in food delivery revenue in the region in 2020.

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The off-trade segment was the fastest-growing distribution channel, projected to record a CAGR of 2.28% during the forecast period. The growth of this segment will likely be fueled by the proliferation of the online trade channel, which has been booming in line with the large-scale expansion of e-commerce. Internet penetration has been increasing rapidly in the region. In March 2021, the Middle East had 199.845 million internet users, which amounted to 75.2% of the total population. Of this, 145.441 million used social media platforms, which is where most online meat delivery apps market their service and acquire customers through digital marketing.

The convenience store channel has shown declining trends in recent years, dipping at a rate of 7% in 2021 relative to the previous year. However, the segment will see some progress in the future and is projected to record a CAGR of 1.20% during the forecast period. The declining trend was mainly due to the restrictions imposed during the COVID-19 pandemic, which resulted in people traveling lesser than before.

Saudi Arabia is the largest segment by Country.

In recent years, the poultry meat market has been growing. From 2018 to 2021, it registered a growth of 10.79%, by value, in the Middle East. With the increased demand for poultry meat due to an increase in ex-pats, the government provided support to expand poultry production, leading to the growth of the market. The Middle East Poultry Expo is the largest exhibition in the poultry industry organized in the Kingdom of Saudi Arabia. It enhances investment opportunities in the poultry industry and provides an ideal trading platform that brings local investors, suppliers, and global expertise houses together to develop the poultry industry and achieve poultry self-sufficiency.

In the poultry meat market, Bahrain is expected to be the fastest-growing region during the forecast period. It registered a growth of 4.03% by value. Poultry spending accounts for the largest proportion of the total food spending in Bahrain, and it is expected to increase further, documenting Bahrain's shifting dietary spending habits. Bahrain witnessed an influx of ex-pats from Asia and western countries, resulting in food preferences becoming more international and food such as hamburgers and fried chicken becoming popular with Bahraini consumers. Consumption is largely dominated by religious affiliation by Bahraini consumers. Poultry meat is majorly consumed in Saudi Arabia. It is projected to register a growth of 1.64%, by value, during the forecast period. Saudi Arabia's Minister of Environment plans to increase the Kingdom's self-sufficiency rate for poultry meat by 80% by 2025. The new investments into Saudi Arabia's poultry production sector will be valued at USD 4.5 billion by 2025, with plans to increase production capacity to 1.3 million metric ton of broiler chicken annually.

GCC Poultry Meat Market Competitor Analysis

The GCC Poultry Meat Market is fragmented, with the top five companies occupying 33.06%. The major players in this market are Al Kabeer Group ME, Al-Watania Poultry, Almarai Food Company, BRF S.A. and Tanmiah Food Company. (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format
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Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 INTRODUCTION

2.1 Study Assumptions & Market Definition

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- 2.2 Scope of the Study?
- 2.3 Research Methodology

3 KEY INDUSTRY TRENDS

- 3.1 Price Trends
- 3.2 Production Trends
- 3.3 Regulatory Framework
- 3.4 Value Chain & Distribution Channel Analysis

4 MARKET SEGMENTATION

- 4.1 Form
 - 4.1.1 Fresh / Chilled
 - 4.1.2 Frozen / Canned
 - 4.1.3 Processed
- 4.2 Distribution Channel
 - 4.2.1 Off-Trade
 - 4.2.1.1 Convenience Stores
 - 4.2.1.2 Online Channel
 - 4.2.1.3 Supermarkets And Hypermarkets
 - 4.2.1.4 Others
 - 4.2.2 On-Trade
- 4.3 Country
 - 4.3.1 Bahrain
 - 4.3.2 Kuwait
 - 4.3.3 Oman
 - 4.3.4 Qatar
 - 4.3.5 Saudi Arabia
 - 4.3.6 United Arab Emirates

5 COMPETITIVE LANDSCAPE

- 5.1 Key Strategic Moves
- 5.2 Market Share Analysis
- 5.3 Company Landscape
- 5.4 Company Profiles
 - 5.4.1 Al Kabeer Group ME
 - 5.4.2 Al-Watania Poultry
 - 5.4.3 Almarai Food Company
 - 5.4.4 ARASCO
 - 5.4.5 BRF S.A.
 - 5.4.6 Emirates National Food CC LLC (Al Rawadh Foods)
 - 5.4.7 JBS S.A
 - 5.4.8 Tanmiah Food Company.

6 KEY STRATEGIC QUESTIONS FOR MEAT INDUSTRY CEOS

7 APPENDIX

- 7.1 Global Overview

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- 7.1.1 Overview
- 7.1.2 Porter's Five Forces Framework
- 7.1.3 Global Value Chain Analysis
- 7.1.4 Market Dynamics (DROs)
- 7.2 Sources & References
- 7.3 List of Tables & Figures
- 7.4 Primary Insights
- 7.5 Data Pack
- 7.6 Glossary of Terms

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