

Bahrain Poultry Meat - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Bahrain Poultry Meat Market size is estimated at 199.7 million USD in 2025, and is expected to reach 211.7 million USD by 2030, growing at a CAGR of 1.18% during the forecast period (2025-2030).

High consumption and high personal disposable income boost sales

- Off-trade is projected to be the fastest-growing distribution channel with a CAGR value of 1.58% during the forecast period, within which online channels are the fastest-growing distribution channel with a CAGR value of 10.62%, during the forecast period. This is due to the increasing internet penetration rate in the country, which was 99% in 2021, with more than 1.71 million internet users in 2021. The increased consumer spending is also boosting sales, which increased by 18.49% from 2020 to 2021.
- However, on-trade channels are major shareholders, which witnessed a growth of 9.8% in terms of sales value from 2020 to 2022. Due to the rising demand in foodservice outlets, fresh/chilled is the most consumed type of poultry meat, accounting for more than 58.5% of sales in 2022. There has been a staggering 984% increase in the number of tourists arriving in Bahrain, fueling the demand through on-trade channels. However, restaurants need fresh/chilled meat to prepare fresh dishes like butter chicken, chicken shawarma, kebabs, biryani, grilled chicken, and other chicken meat dishes.
- Supermarkets/hypermarkets alone accounted for 24.72% of the overall poultry meat sales throughout the country in 2022. Owing to the large number of shoppers, as people have busy lifestyles, they have the nature of stockpiling the products which has increased the sales for frozen, canned, and processed poultry products. Poultry meat is the second highest domestically produced meat in Bahrain, which was around 8.3 thousand tons in 2022, thus increasing the availability of the meat at lower prices for USD 2.5 per kg, only around 30-40% lower than red meat prices.

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Bahrain Poultry Meat Market Trends

Increased domestic poultry production driving the market growth

- Due to its limited ability to cultivate crops, Bahrain relies heavily on food imports to meet local food demand, importing about 94% of its food in 2022. Bahrain is currently in the 55th position in the Global Food Security Index and lags behind major Gulf countries like Qatar, UAE, Saudi Arabia, and Kuwait. The total volume of food imports increased by 7.8% from 2015 to 2021 in Bahrain, a greater increase than bigger GCC countries such as Saudi Arabia (5.3%) and UAE (3.1%).
- In February 2021, Bahrain and UAE signed a Memorandum of Understanding (MoU) to exchange expertise, studies, and research related to food security. This partnership involved conducting joint training programs as well as significant investments, loans, and subsidies from the government's end to farmers, encouraging the private sector and eventually boosting local production.
- Bahrain is very open to foreign direct investments, and as of 2021, FDI in Bahrain increased by 73% to USD 1.76 billion. Foreign investments and partnerships also benefit the current production scenario. The Bahraini Ambassador of Brazil and Minister of Works, Municipal Affairs, and Urban Plannings conducted an investor's forum in 2021 to welcome foreign investments in the livestock sector. The forum also explored the advantages of modern technologies to support the livestock sector in the field of breeding, as well as to increase the import and export of livestock, red and white meat, and veterinary medicine between the two countries. An agreement regarding food security was signed between Bahrain and Israel in 2020. As of 2021, Bahrain produced around 9 million chicks and imported about 70,000 metric tons of poultry, an 18,000 metric ton increase over 2019, where the import was 52,000 metric tons.

Rising production costs are impacting poultry prices

- The poultry meat market registered a CAGR of 2.08% from 2017 to 2022 in Bahrain. The country has been recently working on food security and self-reliance, owing to which the government is distributing licenses for chicken slaughterhouses to influence the traders to indulge in local production. Bahrain plans to increase local poultry production from 9 million to 20 million chickens over the period of 2023 to 2025 to satisfy the exponentially increasing consumption in the country. Also, an increase in local production will help in moderating the price level in the country, as reliance on imported commodities would be lower.
- The recent surge in prices of poultry meat in all forms and varieties is occurring in Bahrain. This is mostly because of the increase in the prices of local chicken, owing to its high feed and logistics costs. Some persistent logistical problems suppliers have been facing constantly are driver shortages, port congestion, soaring freight rates, and more. Also, with oil prices falling, Bahrain, primarily depending on oil and gas export revenue, lifted price subsidies on various goods and services, including meat, which helped the government recover USD 75 million in 2021.
- The price of poultry meat is also severely affected by chicken feed prices. Prices of soybean and maize, the two key inputs that are used as livestock feed in the poultry industry, are rising sharply due to the conflict between Russia and Ukraine. The main driver of rising feed costs has been soybean. Feed accounts for 70% of variable costs, and by volume, maize forms 60-63% of the feed, while soymeal forms 25-27%. In 2021, maize prices fell by 30%, while soybean prices rose by 6% Y-o-Y compared to the previous year.

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Bahrain Poultry Meat Industry Overview

The Bahrain Poultry Meat Market is fragmented, with the top five companies occupying 13.90%. The major players in this market are Almarai Food Company, Americana Group, BRF S.A., Tanmiah Food Company and The Savola Group (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 INTRODUCTION

2.1 Study Assumptions & Market Definition

2.2 Scope of the Study?

2.3 Research Methodology

3 KEY INDUSTRY TRENDS

3.1 Price Trends

3.1.1 Poultry

3.2 Production Trends

3.2.1 Poultry

3.3 Regulatory Framework

3.3.1 Bahrain

3.4 Value Chain & Distribution Channel Analysis

4 MARKET SEGMENTATION (includes market size in Value in USD, Forecasts up to 2030 and analysis of growth prospects)

4.1 Form

4.1.1 Canned

4.1.2 Fresh / Chilled

4.1.3 Frozen

4.1.4 Processed

4.1.4.1 By Processed Types

4.1.4.1.1 Deli Meats

4.1.4.1.2 Marinated/ Tenders

4.1.4.1.3 Meatballs

4.1.4.1.4 Nuggets

4.1.4.1.5 Sausages

4.1.4.1.6 Other Processed Poultry

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

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4.2.2 On-Trade

5 COMPETITIVE LANDSCAPE

5.1 Key Strategic Moves

5.2 Market Share Analysis

5.3 Company Landscape

5.4 Company Profiles (includes Global level Overview, Market level overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and analysis of Recent Developments)

5.4.1 Almarai Food Company

5.4.2 Americana Group

5.4.3 BRF S.A.

5.4.4 JBS SA

5.4.5 Lulu International Group

5.4.6 Sunbulah Group

5.4.7 Tanmiah Food Company

5.4.8 The Savola Group

6 KEY STRATEGIC QUESTIONS FOR MEAT INDUSTRY CEOS

7 APPENDIX

7.1 Global Overview

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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