

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

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Report description:

The GCC Poultry Meat Market size is estimated at 7.73 billion USD in 2025, and is expected to reach 8.39 billion USD by 2030, growing at a CAGR of 1.65% during the forecast period (2025-2030).

Off-trade is the fastest-growing segment owing to the adoption of digital promotions

- The on-trade segment dominates the distribution channels for poultry meat, through which almost two-thirds of the poultry meat products are consumed in the country. The growing food service industry is boosting sales of poultry meat in on-trade channels. Around 76% of consumers in the Middle East preferred to consume healthy food in 2021. Many consumers started trying new foods tested and invented by several on-trade channels across Middle Eastern food service establishments, increasing the market share of poultry meat. Food service businesses resorted to delivery platforms to make up for the foot traffic lost in their stores after the effect of the pandemic.
- The fastest-growing distribution segment is the off-trade segment, projected to record a CAGR of 2.20% by value during the forecast period. The growth of this segment will 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. As of 2022, the Middle East had more than 200 million internet users, accounting for 79% of the total population. Of this, 145.441 million were users of social media platforms, which is where most online meat delivery apps market their service and acquire customers through digital marketing.
- Supermarkets and hypermarkets recorded growth with a CAGR of 4.96% by value from 2017-2022. Supermarkets and hypermarkets provide promotional offers and discounts. The growth in the segment is due to the presence of a wide range of products, including imported products, which are price-competitive compared to local products.

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Government's investments to achieve self-sufficiency in poultry meat are driving the market

- The poultry meat market has been growing over recent years. During the historical period, it registered a CAGR of 4.23% by value in the GCC. With the increased demand for poultry meat due to an increase in expats, 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.
- The region witnessed an influx of expats from Asia and Western countries, especially in the UAE, Kuwait, and Saudi Arabia. The expat population in Saudi Arabia was around 41.6%, whereas the UAE had around 90% expat population as of 2022. The increasing expat population is resulting in food preferences becoming more international and food such as hamburgers and fried chicken becoming popular with consumers in the region.
- Poultry meat is majorly consumed in Saudi Arabia. It is projected to register a growth rate of 1.51% by value during the forecast period. Saudi Arabia's self-sufficiency in poultry meat production increased from 45% in 2016 to 68% in 2022. Furthermore, Saudi Arabia's Minister of Environment announced 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 tons of broiler chicken annually.

GCC Poultry Meat Market Trends

Increased domestic poultry production is driving the market's growth

- Saudi Arabia is the largest producer of poultry in the Middle East, accounting for about 22.93% of the region's total poultry production in 2022. Domestic poultry production in the country reached more than 60% self-sufficiency level in 2022. The Saudi Ministry of Environment, Water, and Agriculture (MEWA) announced plans to collaborate with the private sector to increase that level to more than 85% by 2030. The government has also been actively working to remove obstacles for producers to acquire and use the land for poultry production, provide loans for equipment purchases, and reform its subsidy system for feed, livestock, and poultry.
- In 2022, Saudi's local chicken meat production reached 1.130,000 metric tons, an increase of 25.56% from 2020, mainly due to the expansion of production facilities of the largest chicken producers, such as Al Watania Poultry Farms and Alyoum Chicken Farm. The expansion project will increase these farms' daily production from 850,000 to one million chickens per day.
- Poultry production in the United Arab Emirates reached 52,573 metric tons (MT) in 2022. Increasing feed prices and other inputs and a government-set price ceiling on fresh chicken at retail outlets have stopped further production increases. Moreover, the country's limited agriculture is concentrated in Abu Dhabi, where most poultry production occurs. Local poultry farmers, particularly larger and medium-sized producers, have implemented improved biosecurity procedures to reduce the risk of contagious poultry diseases. Some well-managed poultry producers have achieved a 2.5% or lower mortality rate, which has increased output while significantly reducing overall production costs.

Rising production costs are impacting the poultry prices

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- In GCC countries, the cost of poultry increased by 0.92% in 2022. The region has seen an increase in the local production. The majority of locally produced chicken meat is chilled, expensive, and consumed primarily by the local population. Price controls have unintentionally favored cheaper, non-fresh imported poultry products. The UAE government imposed a price ceiling on regional coops and other retail enterprises that sell primarily to the UAE community. The price cap also impacted the profitability of chicken farms because farms could not boost prices to keep up with the rising costs. All fresh chicken sold in the United Arab Emirates is subject to a price cap set by the government at USD 5.85 + VAT, which is not allowed to be exceeded by shops.
- For a decade, Kuwait has been dealing with a shortage of poultry products, which is set to increase the price of poultry in the country further. The shortage of poultry is caused by local poultry companies that deliberately refrained from providing supermarkets with their products in order to increase their prices, which rose by 20% in June 2022. Notably, Saudi Arabian poultry exports did not increase in 2022, while Bahraini exports fell drastically, as both countries faced higher feed costs (both are dependent on imported feed and other inputs).
- The Russia-Ukraine War also increased poultry prices in 2022, with some poultry companies raising their prices due to rising feed costs. The Kuwaiti government's support only covers corn and does not cover other feeds, such as soy, vitamins, and salts, and their prices have risen globally. The price of a ton of soy increased from USD 450 to 900 in just a month in March 2022. Thus, these factors have boosted the price of poultry in the region.

GCC Poultry Meat Industry Overview

The GCC Poultry Meat Market is fragmented, with the top five companies occupying 10.38%. The major players in this market are Al-Watania Poultry, Almarai Food Company, 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

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