

## **India Poultry Market Size, Share and Growth Analysis Report - Forecast Trends and Outlook (2025-2034)**

Market Report | 2025-08-12 | 145 pages | EMR Inc.

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### **Report description:**

The India poultry market was valued at USD 30.46 Billion in 2024 . Digitally integrated cold chain logistics, especially for tier 1 and 2 poultry suppliers, are allowing real-time temperature monitoring, reducing spoilage, enhancing safety, and boosting trust among institutional buyers and QSR chains. As a result, the market is expected to grow at a CAGR of 8.10% during the forecast period of 2025-2034 to reach a value of USD 66.37 Billion by 2034 .

The fast-paced growth in the market is also supported by innovation, government incentives and changing dietary patterns. As of FY23, India observed 7.3% CAGR in egg production and ranks fifth in broiler meat production globally, with over 9.77 million tonnes of broiler meat produced annually. The government's National Livestock Mission (NLM) and Animal Husbandry Infrastructure Development Fund (AHIDF) are making large investments into infrastructure and breeding technology, transforming the India poultry market dynamics. In addition, according to the Ministry of Statistics and Programme Implementation (MOSPI) data, in FY 2023, India's urban household grocery expenditure patterns showed significant investments in processed foods. Processed food expenditures were the highest at 10.5%, indicating a growing preference for convenience foods and indirectly boosting the market growth.

Moreover, agri-tech startups like Eggoz and Happy Hens are reshaping last-mile delivery, cold-chain management, and traceability, accelerating the India poultry market development. With India's urban population growing rapidly, demand for protein-rich diets has surged, fuelling the growth of organised poultry. This is shifting the market from fragmented backyard farming to vertically integrated, technology-backed poultry enterprises focused on hygiene, scale and sustainability.

Key Trends and Recent Developments

December 2024

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Evonik launched Ecobiol Soluble Plus in India. This innovative water-soluble probiotic is intended to improve gut health and overall animal performance. This product launch supports the poultry sector's shift towards antibiotic-free production, improving feed conversion ratios for commercial broiler operations.

November 2024

Allana Group announced its entry in the India poultry market with an investment of USD 120 million in setting up its venture. Through the strategic initiative, the company aims to revolutionise poultry consumption and production through advanced processing technologies and fully integrated operations.

November 2024

Boehringer Ingelheim announced the launch of its latest advancement in Marek's disease vaccines in India, offering enhanced protection through an innovative controlled attenuation process and delivering the right balance between efficacy and safety. The vaccine addresses the gap in the poultry supply chain with a groundbreaking serotype-1 construct vaccine, supporting farmers to reduce disease outbreaks, promote flock health, and enhance productivity.

August 2023

IB Group's INR 160 crore poultry feed plant and hatchery unit were inaugurated at Amethi, Uttar Pradesh. Spread across 12 acres, the plant has the capacity to produce 600 tonnes of poultry feed per day and 3 lakh broiler chicks per day. IB Group's large-scale feed and hatchery facility in Amethi enhances North India's poultry value chain, boosting daily chick production and ensuring feed security for contract growers.

#### Rise of Vertical Integration Models

Vertical integration is disrupting the overall India poultry market trends. Integrators like Suguna Foods and Venkateshwara Hatcheries are controlling breeding, feed, rearing, processing, and retail under a single command structure. This not only ensures traceability but also optimises efficiency and quality control, giving B2B players stable supply chains. According to industry reports, integrated players now contribute to nearly 80% of India's organised poultry meat production. This trend is attracting private equity investments into backward linkages like hatcheries and feed mills.

#### Surge in Antibiotic-Free & Functional Poultry

The India poultry market observes a growing demand for antibiotic-free and functional poultry products in urban and institutional markets. Companies like Zorabian and Nandu's have responded to this trend by offering vitamin-enriched, organic-certified, or antibiotic-residue-free broilers. Moreover, with the Food Safety and Standards Authority of India (FSSAI) tightening norms around animal feed and drug residues, B2B buyers in hospitality and healthcare are shifting toward premium poultry SKUs that meet compliance standards and clean label expectations.

#### Digital & IoT Adoption in Farm Management

IoT-led farm automation is streamlining feed scheduling, temperature control and health monitoring, stimulating the India poultry market development. Players like Stellapps and KAI Technologies offer poultry farm management software and AI-driven diagnostic tools to mid-sized integrators. These technologies help in reducing mortality rates, improving FCR (Feed Conversion Ratio) and aligning with real-time demand forecasting. Such advancements are also appealing to enterprise buyers seeking predictability in supply and cost efficiency.

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## Cold Chain Infrastructure Expansion

The country's Ministry of Food Processing Industries is incentivising cold chain development through the Pradhan Mantri Kisan Sampada Yojana (PMKSY), widening the scope for India poultry market expansion. With INR 1,200 to 1,400 crore worth of exports in FY2023-2024, the market is benefitted by enhanced storage, transport, and distribution capabilities. This is enabling processed meat players to extend shelf life and cater to metro and tier-2 markets. Cold chain upgrades have become pivotal in B2B procurement strategies, especially for foodservice chains.

## Emergence of Contract Farming & Rural Hubs

Contract poultry farming is an emerging trend in the India poultry market, particularly witnessed in states like Tamil Nadu and Maharashtra. This trend is supported by government subsidies. For instance, the National Livestock Mission provides up to 50% of the project cost, up to a maximum of INR 25 lakh, in subsidies for the establishment of farms, rural hatcheries, and brooder units. This model empowers small farmers through input support, assured B2B retention, and training, bridging supply gaps in peak seasons.

## India Poultry Industry Segmentation

The EMR's report titled "India Poultry Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

### Market Breakup by Segment

- Broiler
- Eggs

Key Insight: Broilers and eggs stand out as two crucial categories in the India poultry market, driven by distinct but compatible driving factors. Broiler demand continues to grow owing to its role in protein-driven diets, short production cycles, and rapid consumption in the growing quick service restaurant (QSR) market. The egg category, on the other hand, is being propelled by health and wellness trends, as consumers recognise nutrient density in eggs while being one of the cheapest protein sources.

### Market Breakup by Region

- Maharashtra
- Tamil Nadu
- Andhra Pradesh
- Telangana
- Haryana
- West Bengal
- Karnataka
- Madhya Pradesh
- Uttar Pradesh
- Bihar
- Punjab
- Orissa
- Rajasthan

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- Kerala
- Others

**Key Insight:** Maharashtra retains its dominance in the poultry market share in India due to large-scale integrated operations, strategic urban demand, and superior market connectivity, exemplified by production hubs in Pune and Nashik. Conversely, Tamil Nadu stands out as the fastest-growing region, leveraging government-backed incentives, the AHIDF scheme, and export-oriented development in districts like Namakkal. While Maharashtra focuses on volume and market accessibility, Tamil Nadu's growth is propelled by structured infrastructure upgrades and export readiness.

## India Poultry Market Share

### By Segment, Broiler Accounts for the Major Share of the Market

The Indian broiler industry, due to its excellent feed conversion ratio and short time to production from hatch to harvest, remains dominant. Broilers offer lower cost meat and are especially relevant for consumers, in developing regions, who seek low-cost meat protein. As per the market report, fast-food services are critically reliant on broiler meat, which enables long-term, stable and guaranteed broiler demand. Progressive advancements in breeding and precision agriculture in the broiler category further emphasises their lead in yields and quality.

The egg category of the India poultry market is witnessing a surge, fuelled by its rebranding as a "superfood" amid rising protein-centric nutrition trends. From gym-goers to senior citizens, eggs are being increasingly consumed for their complete amino acid profile and multifunctional use in diets. Consumer shifts toward meat alternatives also favour this category's growth. Innovation in packaging, fortification, for example, Omega-3 eggs, and sustainable cage-free production are resonating with ethically driven buyers. The increasing integration of eggs into ready-to-eat meals and foodservice offerings further widens their appeal.

## India Broiler Market Share

### By Type, Live Broiler Hold the Dominant Share of the Market

Live broilers represent the dominant type in the India poultry market due to strong consumer preference for freshly slaughtered meat. In wholesale markets and wet markets, broilers dominate sales, especially in non-metro cities where cold storage is limited. For B2B players like local restaurants and traditional meat vendors, live broiler procurement offers flexibility in supply and price negotiation.

Processed broilers, offered as chilled or frozen meat, cut portions, and marinated variants, are picking up pace, boosting the overall demand in the India poultry market, especially across institutional kitchens, QSRs, and online platforms. Brands like Licious, Godrej Yummiez, and FreshToHome are further fuelling growth, supported by robust cold chain and value-added offerings. B2B catering firms and meal kit companies have become bulk buyers of pre-portioned, standardised processed meat.

### By End Use, Food Services Register the Largest Share of the Market

The food service sector, including QSR chains, fine dining, and mid-tier restaurants, remains the leading category for broiler poultry consumption in India. Chains like KFC, Barbeque Nation, and Faasos rely on consistent, hygienic poultry inputs. Demand from cloud kitchens has also skyrocketed, particularly in the post-pandemic era. Food safety regulations and procurement standards have pushed these players to rely on suppliers who offer quality assurance and traceability.

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Household consumption of broiler poultry in India is rising rapidly. Growing protein awareness, busy lifestyles, and the rise of nuclear families are resulting in a greater demand for home-delivered, cleaned, and portioned poultry. Platforms like FreshToHome and ZappFresh have capitalised on this trend by offering hygienic, ready-to-cook meat with assured traceability. Further, post-COVID safety concerns and digital adoption have shifted buying preferences from local butchers to branded players, accelerating the India poultry industry growth.

#### By Distribution Channel, the Traditional Retail Stores Occupy a Significant Share of the Market

Traditional meat shops and kirana-style outlets remain the largest distribution channel for the broiler market in India. These channels dominate in semi-urban and rural regions where consumers prefer to inspect the meat quality before purchasing. These retailers offer affordable pricing, flexible quantities, and proximity, which are key factors for daily buyers. Despite hygiene concerns, their presence ensures loyalty and ease of access. Even many small restaurants source from these outlets due to cost advantages.

B2B distribution is accelerating with the growth of institutional buyers, QSRs, and cloud kitchens, stimulating the overall India poultry market revenue. B2B buyers are signing agreements with hotels, canteens, and hospitals to deliver hygienic, portioned, and traceable poultry products. Startups like Captain Fresh are digitising procurement, offering real-time inventory, pricing, and fulfilment solutions. These systems appeal to enterprise clients seeking predictability and quality assurance.

#### India Eggs Market Share

##### By End Use, the Retail Category Secures the Leading Position in the Market

Retail continues to be the largest channel boosting the eggs consumption in India. This end use category is supported by widespread household demand across both urban and rural India. Moreover, urban consumers are also inclining more towards branded eggs offering nutrition enhancements like vitamin D or omega-3. Online platforms have made doorstep delivery of graded and packed eggs more accessible. Brands such as Eggoz and Nutricharge are building loyalty via packaging, cleanliness, and quality certifications, consolidating retail's role in bolstering the demand in the India poultry market.

Institutional buyers, including schools, hostels, and corporate kitchens are significantly driving the eggs market growth in the country. State-run mid-day meal schemes and welfare programmes procure eggs in bulk via cooperatives or centralised suppliers. Egg-based protein inclusion is also expanding in child nutrition programmes. This structured procurement is making the category attractive for organised producers, propelling growth in the India poultry market.

##### By Distribution Channel, the Business-to-Business Model Accounts for a Substantial Market Share

B2B networks dominate egg distribution in India, especially in bulk supply to schools, hotels, and corporate kitchens. Cooperatives and large farms handle direct delivery of carton-packed eggs to institutional buyers, ensuring consistency and traceability. Contractual procurement models help maintain cost stability for repeat orders. Government schemes and mid-day meals account for significant B2B volume, alongside private caterers and large foodservice brands.

Modern grocery chains and online-first supermarkets are rapidly expanding their India poultry market share. These stores offer branded, nutrition-enriched eggs in various SKUs, catering to health-conscious urban consumers. Refrigerated shelving and standardised inventory management help ensure freshness and minimal breakage. Packaged egg brands such as Eggsland's Best, Vital Farms, or BigBasket's "fresHo!" use barcodes, expiry tracking, and clean labelling to gain trust.

#### India Poultry Market Regional Analysis

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## By Region, Maharashtra Represents the Dominant Market Share

Maharashtra leads the industry, with commercial hubs in Pune and Nashik driving high production volumes. Integrated poultry firms like Suguna Foods and Skylark Hatcheries benefit from government-backed agritech parks, such as the Maharashtra Animal and Fishery Sciences University's innovation centre, boosting R&D and operational efficiency. The state's robust transport infrastructure, including NH-48 and proximity to Mumbai port, facilitates seamless poultry product distribution in the country. Recent reports indicate that Maharashtra contributes 15% to poultry production, highlighting the state's pivotal role in meeting rising protein consumption and export ambitions.

Tamil Nadu is rapidly emerging as the fastest-growing regional poultry market in India, driven by proactive state policies promoting poultry clusters and improved veterinary services. The Animal Husbandry Infrastructure Development Fund (AHIDF) offers low-interest credit, enabling small and medium enterprises in districts like Namakkal to invest in bio-secure farms and modern hatcheries. Moreover, Namakkal, often called the "Egg City," is evolving into a major export hub, catering to Middle Eastern and Southeast Asian markets. According to industry analysis, Tamil Nadu's Namakkal egg exports accounted for 95% of the country's total exports, supported by structured incentives and robust infrastructure.

## Competitive Landscape

Leading India poultry market players like Suguna, Venky's and Skylark dominate the upstream operations, while a new wave of D2C startups and agritech firms is redefining downstream efficiency. Players are now focusing on traceability, disease resilience, and export certifications. Opportunities are growing in value-added food products, branded SKUs, and low-antibiotic meat. E-commerce integration, blockchain-led farm-to-fork tracking, and solar-powered poultry farms are gaining attention.

Additionally, partnerships between integrators and cold chain logistics firms are making B2B fulfilment more seamless. Smart farming, cold chain expansion, functional poultry, contract farming, and antibiotic-free meat are reshaping the market, making it more export-ready, technology-integrated and health-oriented. India poultry companies are also exploring halal-certified and frozen meat variants to meet GCC and ASEAN demand. The key growth areas lie in smart farming, predictive analytics, and biosecurity integration.

## IB Group

IB Group, headquartered in Chhattisgarh, India, and established in 1985, is one of the country's largest protein-centric Agri conglomerate with a turnover of INR 9,700 crore in FY 2023. The company boasts a robust presence in 26 states and has strategically partnered with 25,000+ farmers and dealers.

## Suguna Foods Private Limited

Suguna Foods Private Limited, headquartered in Tamil Nadu, India, and founded in 1984, is one of largest companies in the India poultry market. The company ranks among the top ten poultry producers globally and offers various poultry products and services across India. Its operations extend to broiler farms, feed mills, hatcheries, processing plants, feed mills, animal healthcare products, and nutritional supplements.

## Skylark Hatcheries Pvt. Ltd

Skylark Hatcheries Pvt. Ltd, headquartered in Haryana and founded in 1985, is a leading integrated poultry company in North India. The company has a diverse portfolio of operations including, broiler contract farming, hatcheries, feed production,

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large-scale mechanised farming and equipment fabrication, and poultry processing, among others.

Venky's (India) Limited

Venky's (India) Limited, founded in 1971 and headquartered in Maharashtra, is a leader in the chicken industry. The company boasts diversified activities, including chicken and eggs processing, broiler and layer breeding, poultry vaccines and feed supplements, genetic research, nutritional health products, and poultry feed and equipment, among others. The company has established its position as one of the largest fully integrated poultry firm in Asia.

Other key players in the market are Srinivasa Farms, Bharati Poultry Pvt. Limited, RM Hatcheries, The KEGGFARMS, AMD integrated Farms, and Kadkanath Agro World, among others.

Key Highlights of the India Poultry Market Report:

- Innovations highlighting antibiotic-free broiler farming and processed poultry with extended shelf life.
- Competitive mapping of integrators, contract farming networks, and organised processors like Venky's and Suguna.
- Region-wise breakdown of poultry consumption growth across North-East, Central India, and coastal belts.
- Investment assessment tracking government subsidies for hatcheries and rural poultry entrepreneurship programmes.
- Feed-to-fork value chain insights emphasising biosecurity, traceability technology, and feed cost dynamics.
- Export and import analysis covering processed chicken demand from Gulf and Southeast Asian markets.

Why Rely on Expert Market Research?

- Ground-level insights sourced from leading poultry farms, feed suppliers, and cold storage operators.
- Tailored strategies for B2B players in institutional supply, retail chains, and contract growing networks.
- Research methodology blending government livestock data, trade movements, and real-time price tracking.
- Support for long-term investment planning through market-linked risk and yield modelling.
- Access to interactive poultry demand dashboards and live policy impact trackers for India.

Call to Action

Explore the latest trends shaping the India poultry market 2025-2034 with our in-depth report. Gain strategic insights, future forecasts, and key market developments that can help you stay competitive. Download a free sample report or contact our team for customized consultation on India poultry market trends 2025 .

More Insights On:

India Poultry Management Market India Poultry Feed Market Colombia Poultry Market Mexico Poultry Market Poultry Market

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