

Middle East Poultry Meat - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Middle East Poultry Meat Market Analysis

The Middle East poultry meat market was valued at USD 16.25 billion in 2025 and estimated to grow from USD 16.53 billion in 2026 to reach USD 18.02 billion by 2031, at a CAGR of 1.74% during the forecast period (2026-2031). Moderate growth masks an ongoing structural shift toward premium offerings, sophisticated processing, and climate-controlled production facilities that can withstand regional temperature extremes. Government-backed food-security plans led by Saudi Arabia's USD 5 billion poultry infrastructure drive continue to channel fresh capital into automated hatcheries, vertically integrated feed mills, and high-speed deboning lines. Health-conscious consumers are embracing leaner protein choices, pushing turkey products forward despite chicken's entrenched cultural dominance. Retail modernization, an expanding quick-service restaurant network, and an accelerating e-commerce channel are reshaping distribution economics and channel power, even as on-trade outlets maintain a narrow majority of value sales. Meanwhile, cost volatility in imported corn and soy erodes producer margins, nudging operators toward alternative feed strategies, forward contracts, and tighter inventory cycles.

Middle East Poultry Meat Market Trends and Insights

Rising health awareness encouraging lean protein consumption

Rising health awareness in the Middle East is significantly encouraging the consumption of lean protein options such as poultry meat, which is driving growth in the Middle East Poultry Meat Market. Poultry is preferred for its lower fat content, high protein

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value, and versatility, aligning with consumers' increasing focus on healthier diets. Saudi Arabia, a key market in the region, imported poultry meat valued at USD 1.26 billion in 2023, making it the 8th largest poultry meat importer globally. This reliance on imports reflects both strong demand and ongoing efforts to supplement domestic production. The market is further driven by government initiatives promoting poultry production, investments in modern farming technologies, and a diverse expatriate population with varying dietary preferences. These factors collectively support steady growth in poultry meat consumption as consumers prioritize health and nutrition in their meat choices.

Cultural preference for poultry over red meat due to health and religious reasons

Cultural preference for poultry over red meat is a significant market driver for the Middle East Poultry Meat Market, driven by both health and religious considerations. In the predominantly Muslim region, halal dietary laws prohibit pork consumption, making poultry and other halal-certified meats primary protein sources. Compared to red meat, poultry is often perceived as a healthier option due to its lower fat content, which aligns with rising health awareness among consumers focusing on leaner diets. Additionally, poultry's affordability and versatility make it a preferred choice across diverse cultural and socio-economic groups. This combination of religious adherence and health-conscious consumer behavior sustains robust demand for poultry meat in the Middle East, encouraging investments in poultry production and processing to meet the evolving market needs.

Fluctuating feed and raw material costs increasing production expenses

Fluctuating feed and raw material costs are a significant restraint on the Middle East Poultry Meat Market, increasing production expenses and squeezing profit margins. The region heavily relies on imported poultry feed ingredients such as corn and soybean meal, primarily sourced from global markets like the United States, making feed costs vulnerable to international price volatility. This dependency translates to fluctuating and often rising costs, which directly impact poultry producers' operational expenses. Producers are seeking alternatives like locally-grown wheat and diversified grain sourcing to mitigate this challenge, but these efforts have yet to stabilize feed prices fully. High feed costs consequently increase the overall cost of poultry meat production, constraining market growth and profitability for producers, especially smaller-scale farmers who face tighter margins.

Other drivers and restraints analyzed in the detailed report include:

Government initiatives promoting domestic poultry production for food security
Increased investments in modern poultry farming and technology adoption
Stringent food safety and halal certification regulations

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Chicken maintains a commanding lead in Middle East poultry meat market with a substantial 70.74% market share in 2025. This dominance is supported by well-established consumer preferences and the versatility of chicken, which is widely used across diverse culinary applications from traditional Middle Eastern dishes to global cuisines. Its competitive pricing relative to other poultry options further bolsters its appeal among a broad consumer base. Chicken's availability in fresh, frozen, and processed forms caters to varied consumption occasions, sustaining its pervasive presence. Additionally, local poultry production backed by government subsidies and efficient supply chains strengthens the consistent supply, ensuring chicken remains the staple protein choice in the region's households and foodservice sectors.

Turkey stands out as the fastest-growing segment within Middle East poultry meat market, projected to grow at a 2.31% compound annual growth rate from 2026 to 2031. This growth trajectory is driven by a rising number of health-conscious consumers seeking leaner protein alternatives with lower fat content than chicken. Turkey's premium positioning appeals to

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affluent consumers and those focused on wellness and nutrition, making it popular in both retail and foodservice channels during health and festive seasons. Greater product variety and enhanced availability through imports and local suppliers have improved consumer access to turkey products. Marketing efforts highlighting turkey's health benefits, such as high protein and low cholesterol, have further stimulated interest.

Fresh/chilled poultry meat holds the largest segment share in the Middle East poultry meat market, commanding approximately 53.65% of the market in 2025. This dominance is largely due to consumer preferences for fresh ingredients and traditional cooking methods that emphasize quality and taste. Countries like Saudi Arabia and the UAE have invested significantly in enhancing domestic production capabilities and cold chain infrastructure to ensure fresh poultry availability. The hospitality and foodservice sector, including restaurants and hotels, largely drives demand for fresh and chilled poultry. Consumers also associate fresh poultry with superior nutrition, reinforcing loyalty to this segment. Government initiatives to boost local production reduce dependence on imports and support the segment's continued stronghold in the market.

On the other hand, the processed poultry meat segment is the fastest growing, with a projected CAGR of 2.45% from 2026 to 2031. The segment's growth is propelled by the rapid urbanization in the Middle East and evolving household consumption patterns that favor convenience foods. Processed poultry products, such as nuggets, marinated cuts, and ready-to-eat meals, cater well to the busy lifestyles of working professionals and younger consumers. The rise of modern retail formats and online grocery platforms has improved access to these value-added products. Manufacturers are also innovating their product lines to meet local taste preferences while ensuring halal certification. Growing acceptance of processed poultry as a nutritious and convenient option will likely continue propelling its market expansion.

The Middle East Poultry Meat Market Report is Segmented by Product Type (Chicken, Turkey, Others), Form (Fresh/Chilled, Frozen, Canned, Processed), Category (Conventional Meat, Organic Meat), Distribution Channel (On-Trade, Off-Trade), and Geography (Saudi Arabia, United Arab Emirates, Qatar, Kuwait, Oman, Bahrain, Iran, Jordan, Iraq, and More). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Units).

List of Companies Covered in this Report:

Al-Watania Poultry Company Almarai Company Tanmiah Food Company BRF S.A. Al Islami Foods Tyson Foods Inc. Al Jazira Poultry Farm Al Ain Poultry Farm National Poultry Company Widam Food Company Sunbulah Group Americana Foods Cargill Inc. Ghadeer Poultry Company Al Kabeer Group (The Savola Group) Delmon Poultry Company Oman Flour Mills □ Atyab Poultry Emirates Modern Poultry (Al Rawdah) Hail Agricultural Development Co. (HADCO) Arab Company for Livestock Development (ACOLID)

Additional Benefits:

 The market estimate (ME) sheet in Excel format
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