

# Report Coverage of the Poultry Market in Saudi Arabia & GCC Poultry Overview

December 2023

## INTRODUCTION

IMES Consulting is well known for its market reports on Poultry, Dairy, Soft Drinks, Fruit & Veg, Grocery Retailing, Casual Dining and other food market categories in the KSA and wider GCC region. We are based in Dubai and are centrally involved in Middle East market analysis, advisory and consulting

We will publish our report on the Poultry Market in Saudi Arabia & GCC Poultry Overview on 15th December 2023. The KSA market is a highly significant and diverse market that warrants comprehensive market analysis

A summary of the GCC Poultry market will also be included with this report. We will provide an overview of the GCC market (by country) that can direct market focus and business development decisions

For those clients with a need for detailed market and industry analysis for each of the other GCC countries, we will also publish Poultry reports for UAE, Kuwait, Qatar, Oman and Qatar on 15th December 2023

Our market reports are based on unprecedented research, retail audit, subject matter experts, access to key players and fieldwork conducted in Saudi Arabia and the UAE. This additional research in 2023 allows us to provide a lot more detail to our clients on all aspects of the Poultry market and industry

Our 2023 report places a much greater emphasis on Value-Added Products and Further Processed Products – details for key product categories including shawarma, burgers, franks, nuggets, chicken strips – in terms of market volumes, values, growth rates by product, forecasts, channel splits, supplier shares and indicative product prices



The Poultry market is now an area that major food companies and investors must analyze



Significant investment by local and foreign companies as well as the entry of leading KSA food marketers indicates the level of interest and potential in this key food category



Our consulting work in Poultry confirms that 2023 was a year of real progress, turmoil, policy changes, import bans due to sanitary & Halal considerations and improvement in output for Poultry in KSA



Even the unprecedented events of 2020 & 2021 in light of COVID-19 has not dampened the optimism pervading Poultry in KSA. 2023 has been another year of solid growth and significant new investment



Vision 2030 sees a critically important role for Poultry in terms of economic growth and food security



While many challenges still face Poultry in Saudi Arabia, the positive outlook in late 2022 for the future of Poultry needs to be viewed in light of a full analysis of the KSA Poultry market and industry



The challenges posed by the global pandemic seem to have been well-handled and there is a continuing air of confidence in evidence, with optimism and investment becoming a more familiar response from Poultry marketers

# IMES KSA Poultry Market 2023

## Table of Contents

### Market Environment

- **Economic environment**
  - Key economic indicators 2018-2022 & Outlook
  - COVID-19 – impact on Poultry
- **Population and demographics**
- **Local Poultry industry and capability structure**
  - Production cost
  - Quality
  - Disease
- **Government support**
- **Distribution of Poultry products**
  - Retail environment
  - Foodservice environment
- **Key supplier profiles**
  - Share of total Poultry production 2022 (million birds)
  - Capacity and utilisation
  - Revenue and Margin performance of key Poultry players
- **Regulatory environment**

### Appendix

Contact details for key processors and importers



**BRENDAN NOLAN**  
Managing Director, IMES Consulting



+971 4 3598475



+971 50 5013108



bpn@imesconsulting.com



www.imesconsulting.com

### The Market for Poultry

- **Overall demand levels**
  - Estimated Poultry consumption 2019-2023 (tonnes)
  - Market segmentation by distribution channels 2019-2023 (tonnes)
- **Consumption patterns and projected development**
  - Consumption of Poultry by shelf life 2019-2023 (tonnes)
  - Segmentation by Poultry product type (frozen, chilled, live, value-added) and source (local, imported) 2019-2023
  - Forecasts 2024-2028
- **Live Poultry**
  - Estimated consumption 2019-2023 (tonnes, local currency)
- **Frozen Poultry (Whole & Parts)**
  - Estimated consumption 2019-2023 (tonnes, local currency)
  - Consumption pattern by channel
  - Supply and distribution – domestic production, imports and exports
  - Imports analysis by leading countries of origin
  - Indicative product prices
  - Leading brands and market shares
  - Analysis channel weight and origin
  - Forecasts 2024-2028
- **Chilled Poultry (Whole & Parts)**
  - Estimated consumption 2019-2023 (tonnes, local currency)
  - Consumption pattern by channel
  - Supply and distribution – domestic production, imports and exports
  - Imports analysis by leading countries of origin
  - Indicative product prices
  - Leading brands and market shares
  - Analysis by channel weight and origin
  - Forecasts 2024-2028
- **Value-Added Poultry (Frozen & Chilled)**
  - Estimated consumption 2019-2023 (tonnes, local currency)
  - Details of Value-Added products by major category: shawarma, marinades, burgers, franks, nuggets, strips, etc.
  - Consumption pattern by channel
  - Supply and distribution – domestic production, imports and exports
  - Imports analysis by leading countries of origin
  - Indicative product prices
  - Leading brands and market shares
  - Analysis by channel weight and origin
  - Forecasts 2024-2028
- **GCC Summary (by Country)**
  - Topline quantitative historical analysis for each GCC country and total for 2019-2023
  - Qualitative summary of key issues and developments in each GCC country
  - Forecasts 2024-2028
- **Poultry Industry Challenges & Opportunities for the Future**
  - Vision 2030 – the role of Poultry in KSA self-sufficiency
  - Product/market strategy of key KSA Poultry marketers
  - Key issues facing Poultry markets in Saudi Arabia and the UAE
  - Indicative profitability and performance – who is investing in future growth and innovation
  - The Future – 2023 as a year of renewed market growth & investment in Poultry in KSA