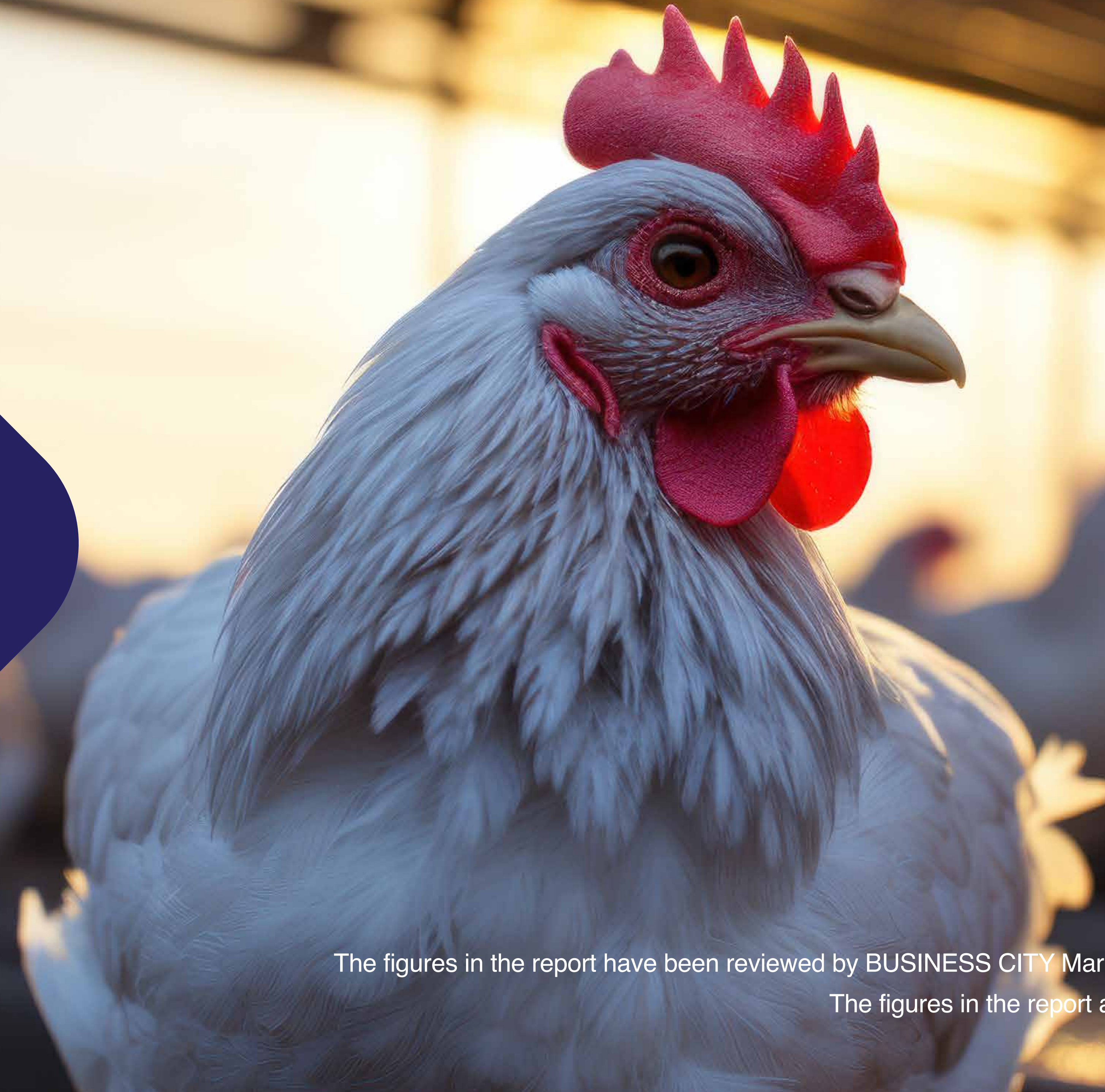


English Version



# Market Size of Poultry Industry in Egypt



The figures in the report have been reviewed by BUSINESS CITY Market Research Center.

The figures in the report are up until May 2024.

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# Market Size of Poultry Industry in Egypt

Analysis of Stocks - Growth Trends and Forecasts until 2030

## Middle East Poultry Meat Market overview

**30.24\$** billion (USD) **2023**

**40.62\$** billion (USD) **2028**

**Compound Annual Growth Rate (2023-2028): 6.08%**

The market size of the poultry meat industry in the Middle East is estimated to be \$30.24 billion in 2023, and it is expected to reach \$40.62 billion by 2028, with a compound annual growth rate of 6.08% during the forecast period (2023-2028).

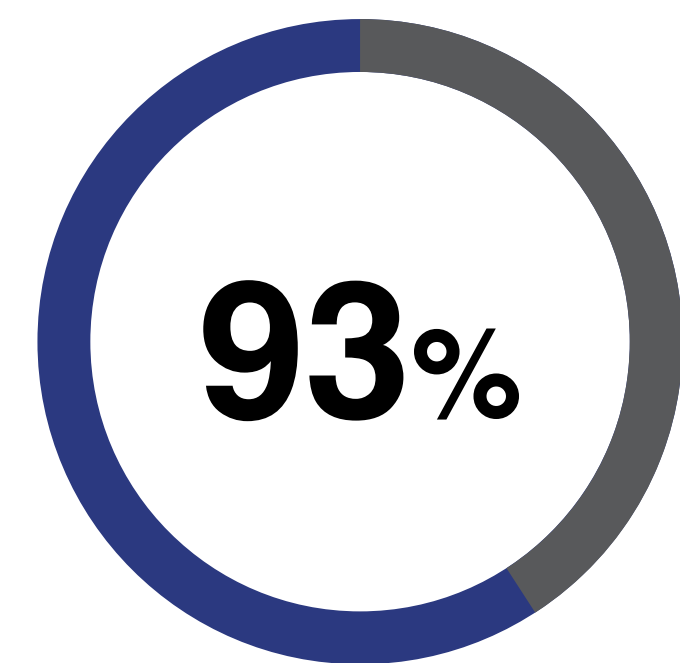
Imports account for \$5.5 billion, and the major players represent 7.7% of the market share, consisting of five companies.

## **The increasing growth of the poultry meat market in the Middle East can be attributed to several factors:**

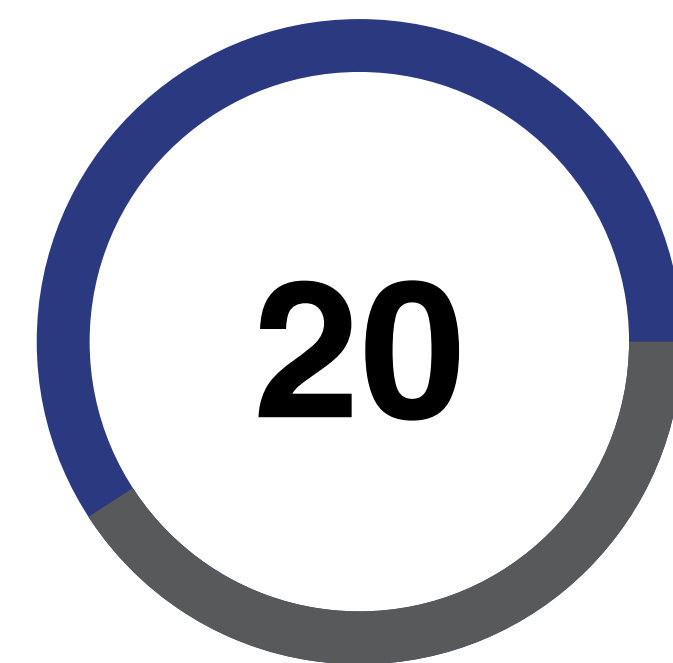
- Recovery of the tourism sector post the COVID-19 pandemic, with an estimated growth rate of 4.2% by 2028.
- Increasing investments in tourism and hospitality sectors in Gulf countries.
- Government facilitations and investment plans to achieve self-sufficiency in poultry meat and eggs.
- Rapid population growth in the region.
- Growing number of expatriates, particularly in Gulf countries.
- Consumer preference for poultry meat as a cost-effective protein alternative to red meat.
- Increasing number of users of food delivery and online food platforms, with 145 million users.
- Growth of the ready-to-eat and processed food sector.
- Consumer concerns regarding the quality of frozen Brazilian chicken and doubts about Halal certifications.

## Challenges Facing the Poultry Industry in the Middle East

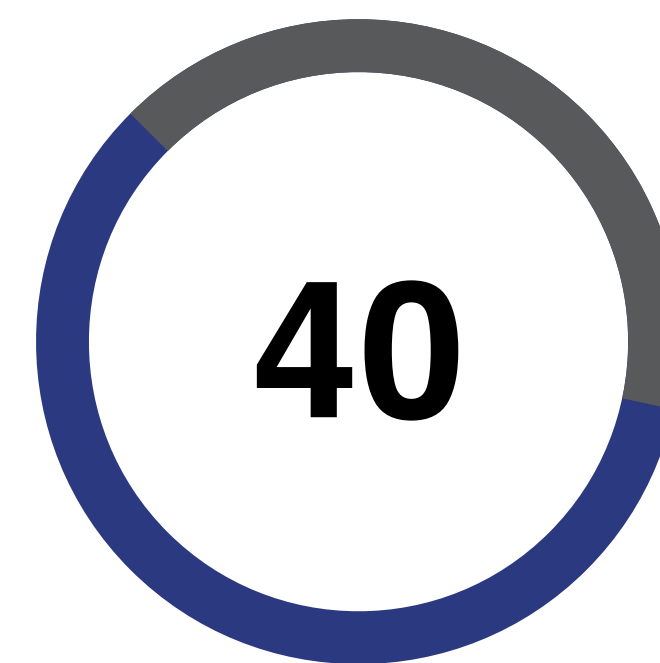
- With the increasing consumption rate of poultry meat, the industry in the Middle East faces several challenges:
- The conflict between Ukraine and Russia, major suppliers of corn and animal feed to the Middle East.
- Fluctuating feed prices due to exchange rate volatility.
- Price competitiveness of Brazilian poultry products.
- Limited adoption of modern production technologies.
- Dependence on imported feed, medicines, and additives, which constitute 70% of production inputs.



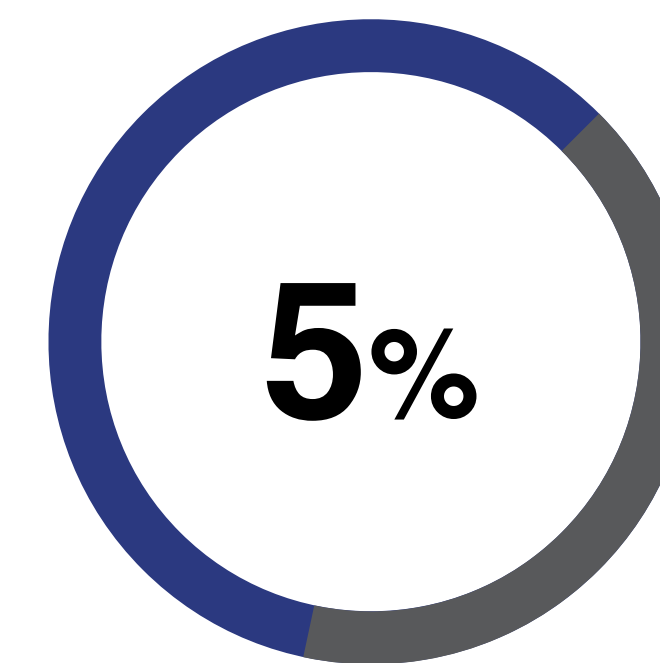
Self-Sufficiency Rate



Billion birds produced annually



Billion eggs produced annually



Expected Consumption Growth Rate (2022-2028)

# Overview of the Poultry Market in Egypt

## Population and Residents


 **112,716,598**

---

 **1.4**  
Billion Birds Commercial Sector  
Production Volume

 **340**  
Million dollars of Egypt's  
frozen poultry meat imports

 **14**  
Billion Eggs Volume  
of Table Egg Production

 **2.7**  
Million Workers  
Employed in the Sector

**320**  
Billion Birds Rural Sector  
Production Volume

 **460**  
Feed Factory

# Overview of the Poultry Market in Egypt


## Population and Residents

 **112,716,598**

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 **27**  
Thousand Farms

**8**  
Thousand Licensed Farms

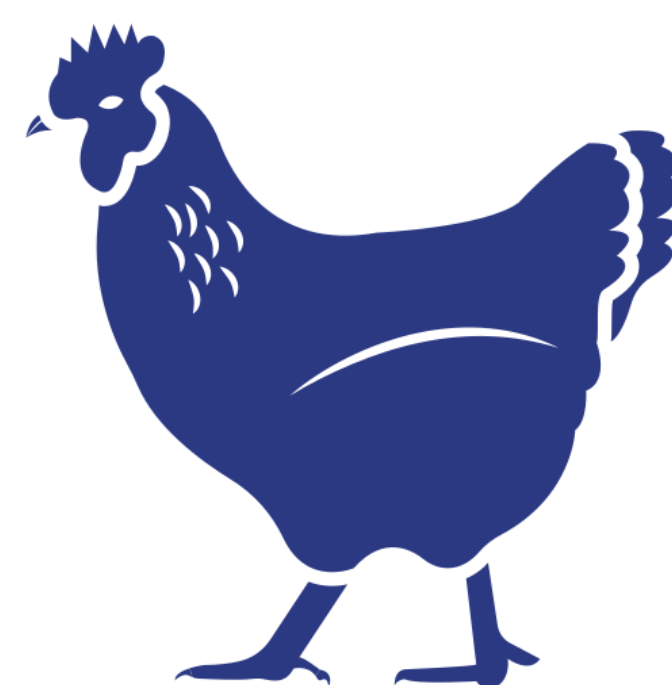
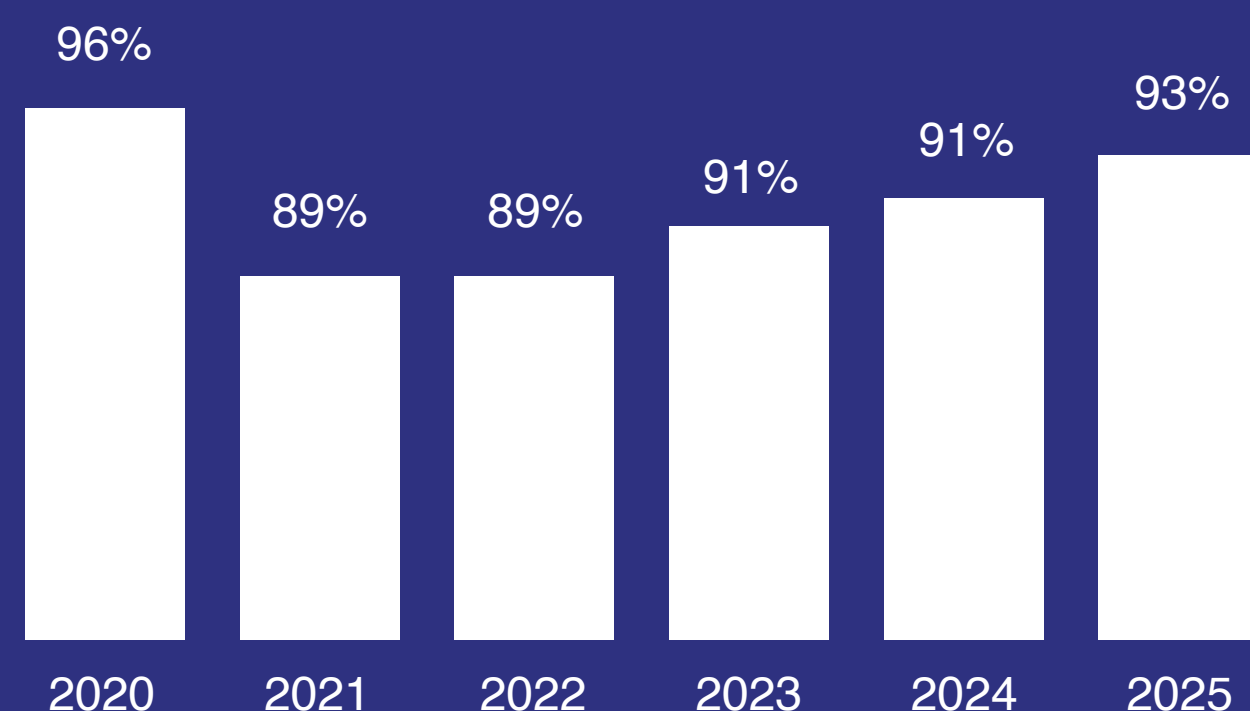
 **3.3**  
Billion dollars investment  
Size in the Poultry Sector

 **355**  
Slaughterhouse

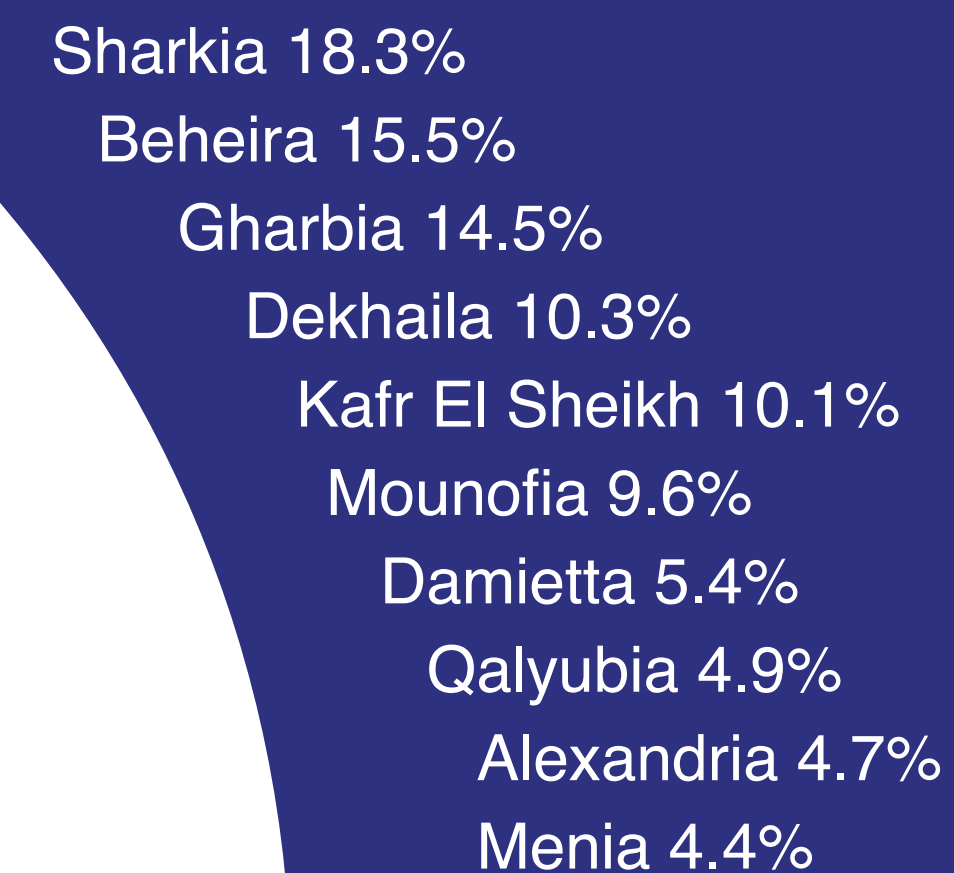
**155**  
Manual slaughterhouse

 **22**  
Company operating with  
an integrated production system

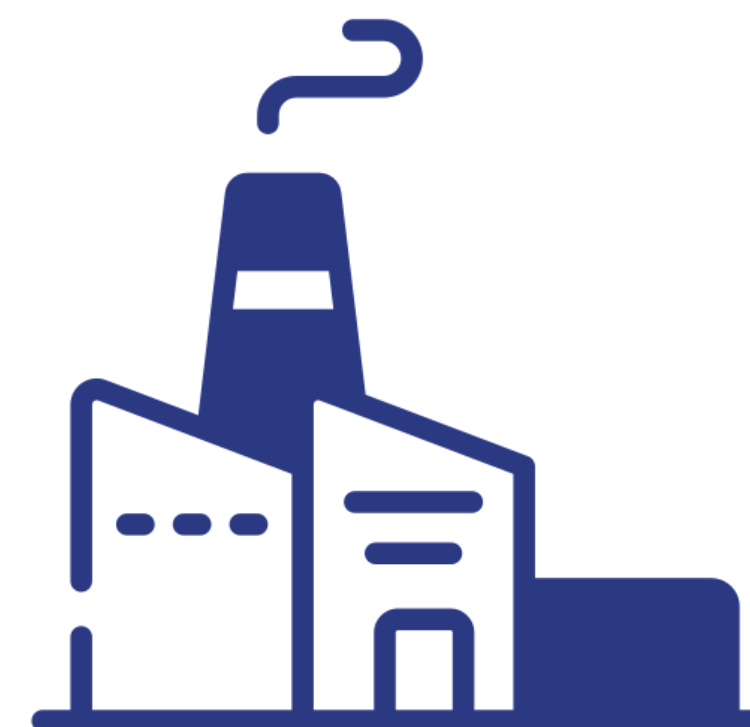
## Development of Self-Sufficiency Rate in Egypt from 2020 to 2025



## Geographical Distribution of Feed Factories



- Sharkia Region: 71 factories
- Bheira: 60 factories
- Gharbia: 56 factories
- Dakahlia: 40 factories
- Kafr El Sheikh: 39 factories
- Menoufia: 37 factories
- Damietta: 21 factories



## Geographical Distribution of Poultry Farms in the Top 4 Governorates by Farm Count

- Sharkia Region: 5,860 farms
- Qalyubia: 2,540 farms
- Beheira: 2,200 farms
- Dakahlia: 2,100 farms

Sharkia 39.3%



Behira 14.9%

Qalyubia 14.9%

Gharbia  
14.6%






Dakhlia  
14.2%

**17.2**  
**Kilo Gram**

## Average Per Capita Consumption of Poultry Meat

**90% Self-Sufficiency Rate in 2023**



Company	Production Volume 1 million chickens	Production Chains	Number of Products	Expected Investments in 2024	Sales Channels
 <b>الوطنية</b> دواجن	<b>5</b>	Full scale	<b>24</b>	2.3 Billion EGP	B2B - B2C
 <b>Dakahlia</b> GROUP	<b>4.5</b>	Full scale	<b>8</b>	400 Million EGP	B2B - B2C
 <b>CPC</b>	<b>6</b>	Full scale	<b>12</b>	600 Million EGP	B2B - B2C
 <b>الأهرام للدواجن</b> PYRAMIDS POULTRY	<b>4</b>	Full scale	<b>16</b>	800 Million EGP	B2B - B2C
 <b>WADI</b> GROUP	<b>2.5</b>	Full scale	<b>9</b>	450 Million EGP	B2B - B2C

# Analysis of the Poultry Sector in Egypt

## Threats & Weakness Points

- High energy prices and their impact on the final product price.
- Exchange rate instability.
- Dependence on imports for 80% of production inputs.
- Opening up imports while local production costs are high compared to imported products.
- Spread of diseases and epidemics with weak veterinary supervision.
- Chaos in the veterinary sector with the proliferation of unregulated medications.
- Insufficient number of slaughterhouses compared to production volume.
- Weak government control over live poultry trading.
- High cost of transportation and storage of frozen poultry.
- Disruption of supply chains and increased costs.v

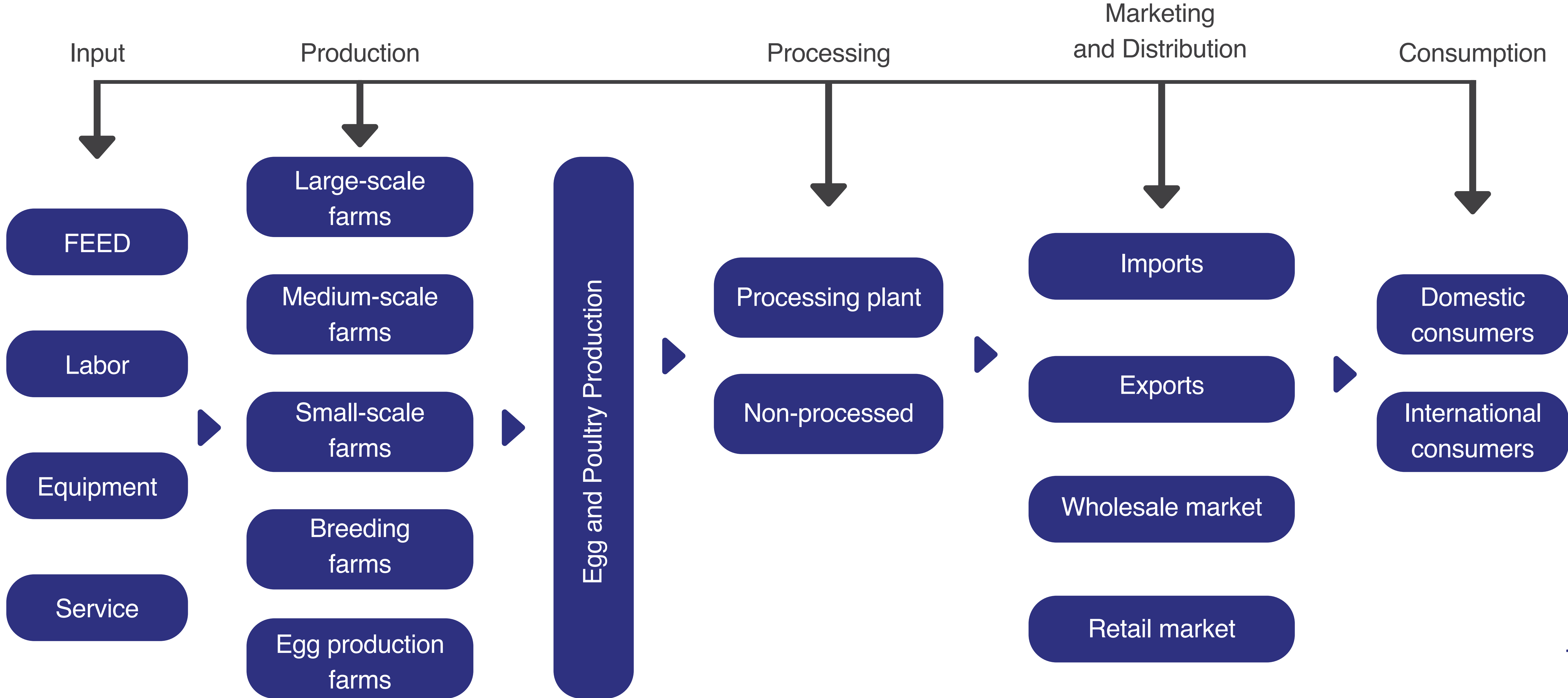
## Opportunities & Strength Points

- Government facilitations and tax exemptions.
- Continuous increase in demand volume.
- Population growth with increased demand.
- Rising prices of alternative meat products.
- Opening up export opportunities for production surplus.
- Increasing number and prevalence of poultry-focused restaurants.
- Expansion of production capacity.
- Expansion and restructuring of closed farms.
- Rapid turnover of capital in poultry projects.
- Diversification of poultry-derived products.

## Analysis Results

- Reliance on integrated and vertical production.
- Increased production of value-added products to enhance profit margins.
- Expansion of refrigerated storage spaces to take advantage of price fluctuations.
- Emphasis on automated operation of slaughterhouses.
- Focus on distribution density.
- Attention to density of presence in the regular supply sector.

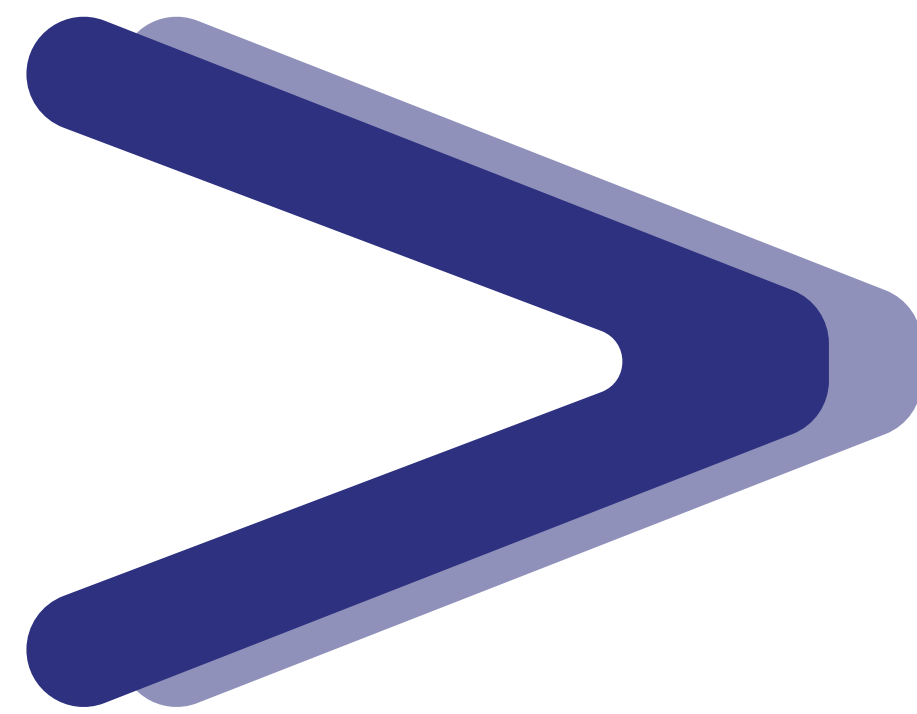
# Poultry Supply Chain Diagram



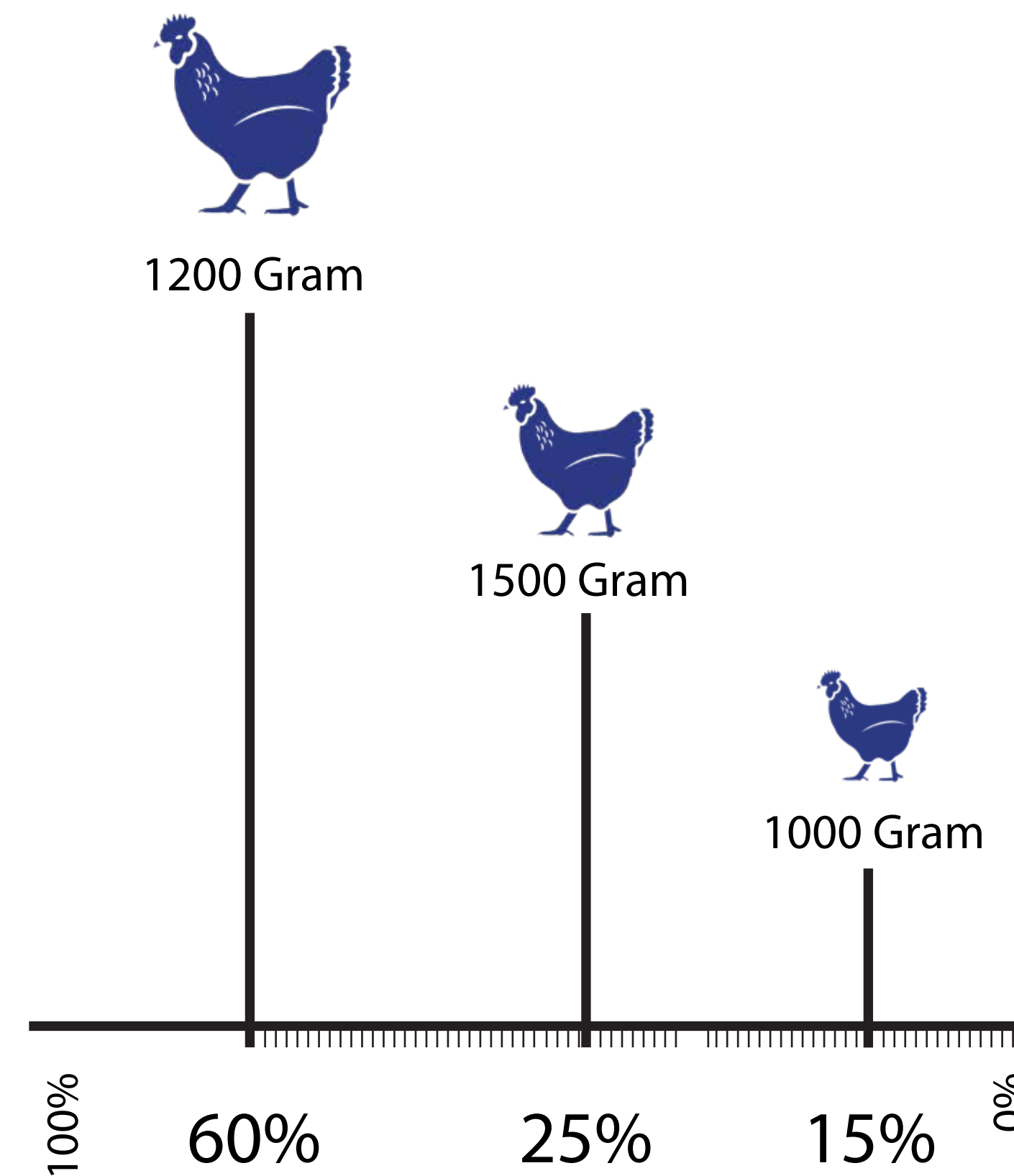
# Analysis of Retail Sales

## 45%

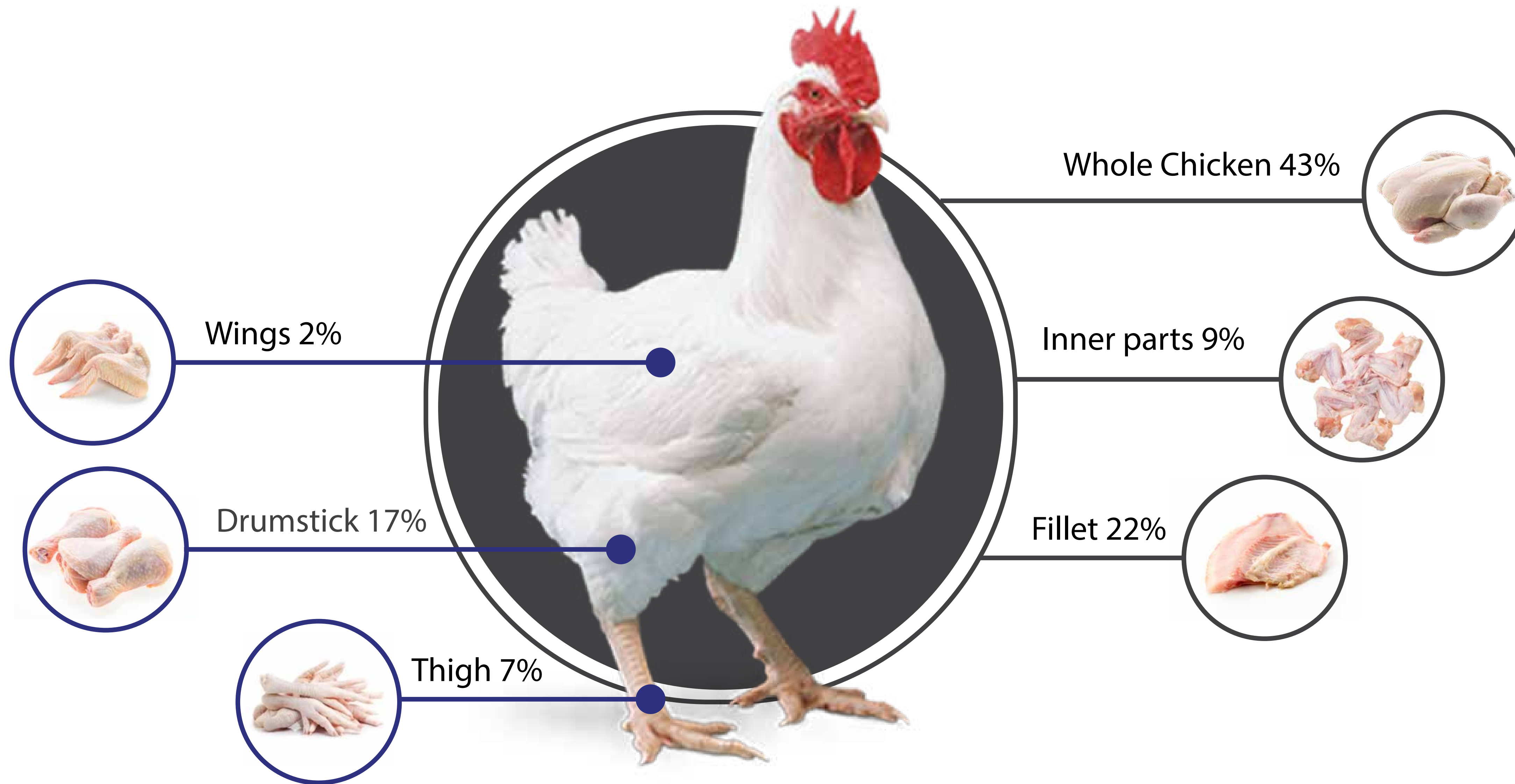
Increase in consumption of processed products compared to 2023.



### Most Demanded Weights



# Analysis of Chicken





**Thank you for your time.**

**Contact us for further inquiries**

**Website**

[www.businesscitygroup.com](http://www.businesscitygroup.com)

**Email**

[contact@businesscitygroup.com](mailto:contact@businesscitygroup.com)

**Phone Number**

+201000-100-556

**Social Media**

@businesscitygroup

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