

Global Poultry Meat Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 312.6 bn
Forecast (2031)	USD 420.7 bn
CAGR (2021-2031)	5.1%
Study period	2021-2031
Largest region	Asia-Pacific · 37.8%
Fastest-growing region	Middle East and Africa · 6.7%
Market concentration	Low
Licence	Individual / Company

The global poultry meat market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Chicken accounts for XX% of market value, supported by competitive feed conversion, short production cycles and broad acceptance across cultures and cuisines. Asia-Pacific leads with a XX% share, while the Middle East and Africa records the fastest regional growth at XX% annually. Integrated processors are directing capital toward biosecurity, automated deboning, value-added formats and cold-chain capacity as avian-influenza risk and retailer sourcing standards reshape competition.

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Executive summary

The global poultry meat market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Chicken accounts for XX% of market value, supported by competitive feed conversion, short production cycles and broad acceptance across cultures and cuisines. Asia-Pacific leads with a XX% share, while the Middle East and Africa records the fastest regional growth at XX% annually. Integrated processors are directing capital toward biosecurity, automated deboning, value-added formats and cold-chain capacity as avian-influenza risk and retailer sourcing standards reshape competition.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The market generated USD XXX billion in 2025 and is forecast to reach USD XXX billion in 2031.
- Global chicken meat production is forecast by the USDA Foreign Agricultural Service at a record XXX metric tons in 2026.
- USDA forecasts global chicken meat exports at XXX metric tons in 2026.
- Chicken represented XX% of poultry meat value in 2025, equivalent to USD XXX billion.
- Fresh and chilled products captured XX% of value, while processed poultry is the fastest-growing product form at a XX% CAGR.
- Asia-Pacific accounted for XX% of global value in 2025, led by China, India, Japan and Southeast Asia.
- The Middle East and Africa will expand at a XX% CAGR through 2031 as population growth, urbanization and halal-certified trade deepen demand.
- Retail remained the largest channel with XX% of value, but foodservice will grow faster at XX% annually.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Poultry Meat Market Trends and Growth Drivers

Poultry meat sits at the intersection of food affordability, industrial efficiency and changing meal habits. Its short biological cycle permits faster supply responses than beef or pork, while integrated feed, hatchery and processing systems create a repeatable route to scale. These characteristics make poultry the default incremental protein in many emerging markets and a flexible convenience platform in mature economies.

The industry's growth profile is nevertheless inseparable from feed markets and animal health. Corn and soybean-meal movements pass rapidly into grower economics, and highly pathogenic avian influenza can close export channels even when consumer demand remains firm. Diversified production origins, compartmentalized supply chains and disciplined biosecurity therefore carry direct commercial value.

Demand is also migrating from kilograms toward solutions. Retailers want traceable, shelf-ready packs; restaurant chains require consistent portion size and cooking performance; households value products that shorten preparation. Processors able to combine primary-production efficiency with branded or customer-specific further processing will capture a larger share of the market's value expansion.

Growth drivers

Poultry's animal-protein affordability advantage

Poultry requires less feed and working capital per kilogram of output than most red-meat systems, allowing processors to defend consumer price points during periods of food inflation. The advantage is strongest in price-sensitive households and foodservice menus where chicken can replace beef or pork without sacrificing portion size.

Emerging-market population and income growth

Urban population growth and rising disposable income are lifting animal-protein intake across South Asia, Southeast Asia, the Middle East and Africa. Poultry captures a disproportionate share of incremental consumption because supply can scale quickly and chicken faces fewer religious restrictions than pork or beef.

Quick-service restaurant network expansion

International and domestic restaurant chains are adding outlets and extending delivery coverage, creating standardized demand for breast fillets, wings, tenders and coated products. Long-term procurement programs also support investment in dedicated further-processing lines and food-safety systems.

Genetics, feed conversion and processing productivity

Advances in breeding, flock management, precision feeding and automated processing increase saleable yield per bird and shorten asset cycles. Producers that integrate hatcheries, feed mills and processing plants can translate these gains into lower unit costs and more stable supply.

Convenience-led product premiumization

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Consumers are shifting from whole birds and undifferentiated cuts toward marinated, portioned, coated and fully cooked products. These formats command higher revenue per kilogram, reduce preparation time and widen poultry's role across snacks, meal kits and home delivery.

Cold-chain and organized retail investment

New refrigerated warehouses, modern supermarkets and temperature-controlled delivery networks reduce spoilage and extend the commercial radius of processors. The shift supports branded chilled meat and frozen convenience products in markets previously dominated by wet-market distribution.

Restraints

Avian-influenza production and trade disruption

Highly pathogenic avian influenza can trigger flock depopulation, movement controls and temporary import restrictions, producing abrupt regional supply gaps. Repeated outbreaks increase expenditure on surveillance, compartmentalization, downtime controls and insurance.

Feed-input price volatility

Corn, wheat and soybean meal constitute the largest variable cost in intensive poultry production. Weather shocks, energy costs and trade restrictions can compress grower and processor margins before retail contracts reprice.

Rising welfare and compliance costs

Lower stocking densities, enriched housing expectations, antimicrobial restrictions and enhanced traceability require capital expenditure and operating changes. Compliance raises production costs most sharply for legacy intensive systems and smaller independent growers.

Cold-chain and route-to-market constraints

Inadequate refrigeration, unreliable power and fragmented last-mile distribution restrict the sale of chilled and processed poultry in lower-income markets. These weaknesses also elevate food-safety risk and favor informal whole-bird channels over higher-value products.

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Poultry Meat Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Poultry's animal-protein affordability advantage	XXX	XXX	XXX
Emerging-market population and income growth	XXX	XXX	XXX
Quick-service restaurant network expansion	XXX	XXX	XXX
Genetics, feed conversion and processing productivity	XXX	XXX	XXX
Convenience-led product premiumization	XXX	XXX	XXX
Cold-chain and organized retail investment	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Avian-influenza production and trade disruption	XXX	XXX	XXX
Feed-input price volatility	XXX	XXX	XXX
Rising welfare and compliance costs	XXX	XXX	XXX
Cold-chain and route-to-market constraints	XXX	XXX	XXX

Source: XXX

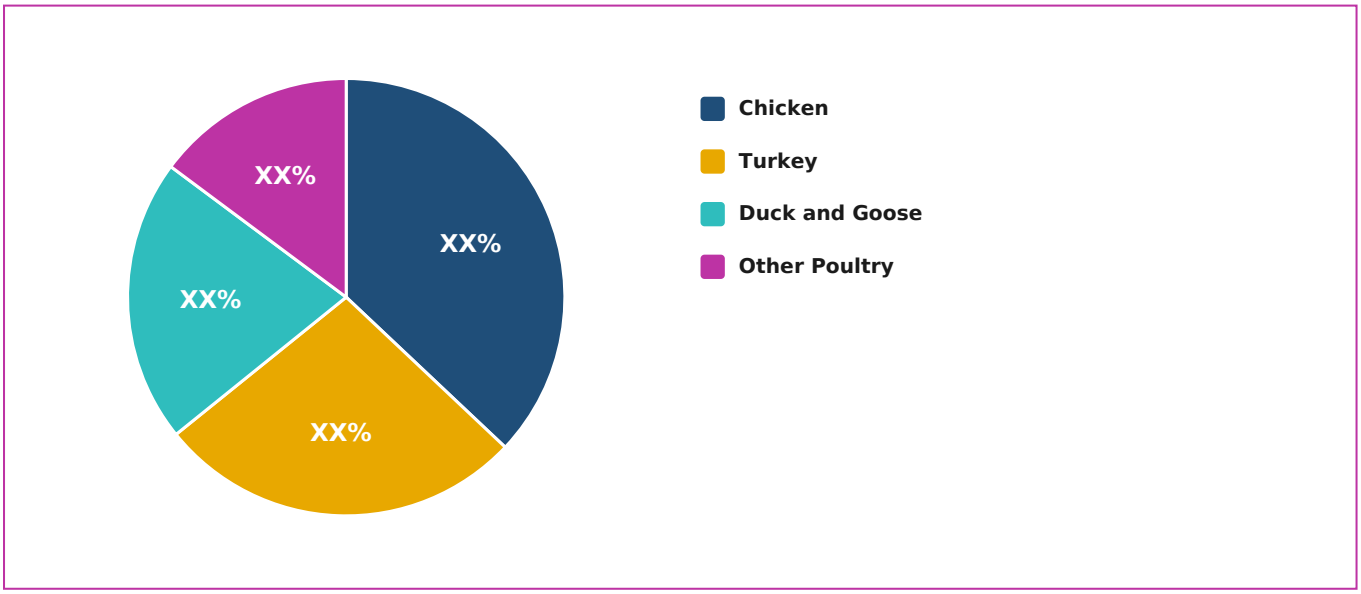
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Poultry Meat Market Segmentation by Species, Product Form and Channel

By Species

Chicken dominates through superior feed conversion, short grow-out cycles, scalable processing and acceptance across major religious and culinary traditions. Turkey retains a meaningful position in North America and Europe, particularly in deli meats and seasonal consumption. Duck and goose grow fastest from a smaller base as Asian foodservice, premium retail and cross-border prepared-food trade expand.

Value share by species, 2025



Source: XXX

Value by species, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Chicken	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Turkey	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Duck and Goose	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Poultry	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

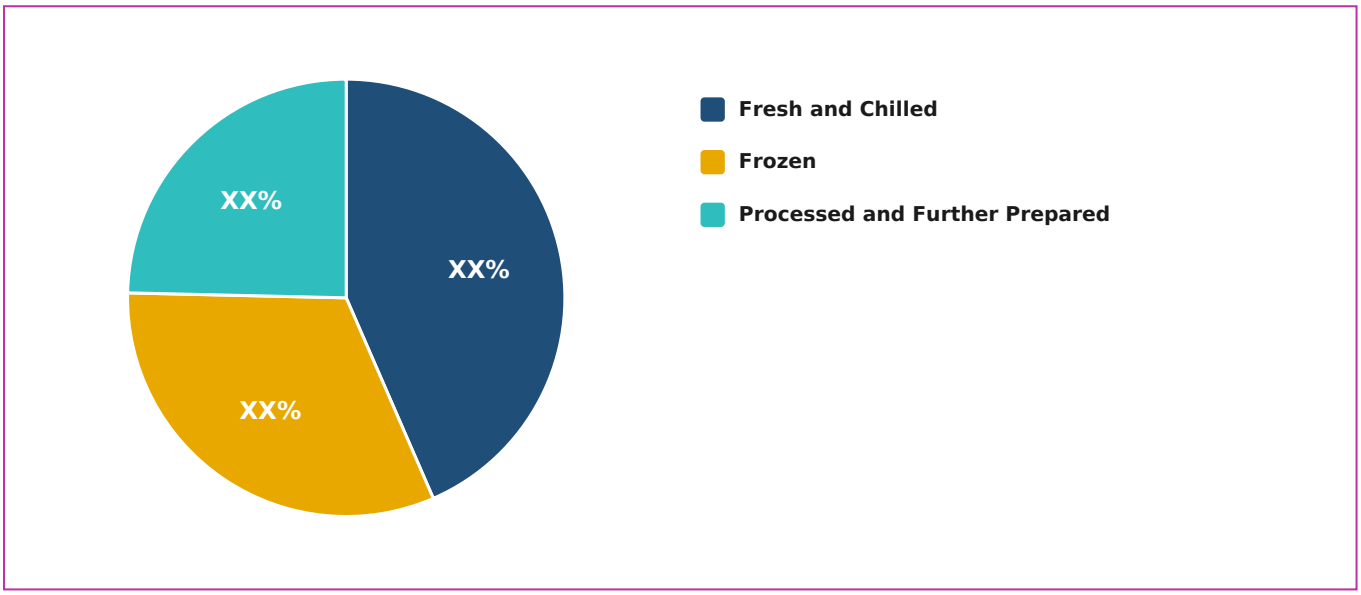
By Product Form

Fresh and chilled meat leads in markets with dense processing and retail infrastructure because consumers associate short shelf life with quality and provenance. Frozen poultry remains central to long-distance trade, foodservice inventory management and price-sensitive markets. Processed poultry gains share

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through marinated, coated, smoked and fully cooked products that reduce preparation time and support higher margins.

Value share by product Form, 2025



Source: XXX

Value by product Form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Fresh and Chilled	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Frozen	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Processed and Further Prepared	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Cut and Presentation

Parts and cuts lead because breasts, thighs, wings and leg quarters can be directed toward different customer and export markets. Whole birds remain important in household cooking, rotisserie programs and lower-income markets. Boneless and portion-controlled products are the fastest-growing presentation as labor-constrained kitchens seek predictable cooking performance and yield.

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Value by cut and Presentation, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Parts and Cuts	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Whole Birds	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Boneless and Portion-Controlled	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ground, Minced and Other Presentations	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Retail remains the largest channel through supermarkets, hypermarkets, traditional meat shops and rapidly expanding digital grocery platforms. Foodservice growth is driven by quick-service chicken concepts, restaurant delivery and institutional meal programs. Industrial users purchase poultry for deli meats, ready meals, soups, snacks and other prepared foods requiring standardized input specifications.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial and Institutional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Production Claim

Conventional systems dominate because they deliver consistent volume and accessible pricing. Antibiotic-responsible and certified higher-welfare tiers are gaining listings from major retailers and restaurant chains, especially in North America and Western Europe. Organic remains a premium niche constrained by feed cost, land requirements and certification expense.

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Value by production Claim, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Antibiotic-Responsible and Certified Higher-Welfare	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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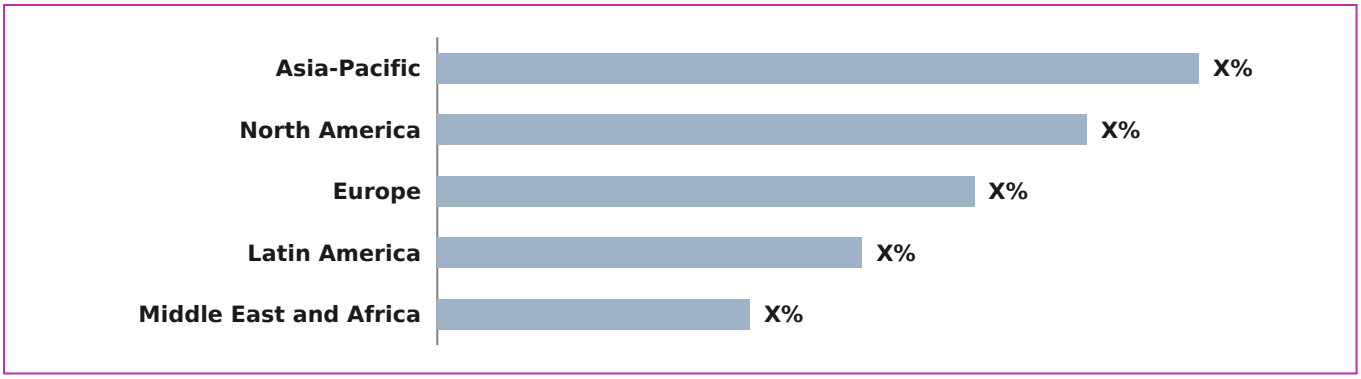
Poultry Meat Market Regional Analysis and Country Outlook

Asia-Pacific held XX% of global poultry meat value in 2025. China anchors the region through its large integrated broiler base and rapidly expanding further-processing sector, while India and Southeast Asia supply the strongest incremental consumption as urban households, restaurant chains and refrigerated retail networks expand. Japan and South Korea remain premium import markets with high demand for portion-controlled cuts and prepared products.

North America represented XX% of value and remains the most developed market for branded chilled chicken, foodservice specifications and fully cooked products. The United States combines large-scale corn and soybean production with highly automated processing and is a major exporter of leg quarters and other dark-meat cuts. Europe accounts for XX%, with Poland, Spain, France, Germany, Italy and the United Kingdom shaping regional production and consumption under increasingly stringent welfare, origin and environmental rules.

The Middle East and Africa is the fastest-growing region at a XX% CAGR. Saudi Arabia and the United Arab Emirates are investing in food security and local processing, while imported halal-certified frozen poultry remains essential across the Gulf and much of Africa. Latin America benefits from Brazil's feed base, integrated production and global veterinary access; domestic growth in Mexico, Colombia and Peru complements Brazil's export-led scale.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Poultry Meat Market Competitive Landscape and Company Share

The global market is fragmented, with the ten largest suppliers accounting for XX% of 2025 value. JBS/Seara, Tyson Foods, MBRF, WH Group, New Hope Liuhe and Wen's Food Group possess major integrated platforms, but country-level competition also includes cooperatives, family-controlled processors and thousands of independent growers. Scale advantages arise from feed purchasing, breeding access, plant utilization, product-mix optimization and the ability to maintain multiple export accreditations.

Leading processors are moving beyond commodity whole birds into branded chilled cuts, coated products, cooked proteins and restaurant-specific solutions. Automated deboning, digital flock monitoring and water- and energy-efficiency projects are lifting throughput and reducing labor intensity. Geographic diversification is also gaining weight because disease-related trade restrictions rarely affect every production origin simultaneously.

Consolidation remains active where processors can secure grower networks, feed assets, brands or market access. The Marfrig-BRF combination created MBRF, while JBS continues to invest in Seara facilities and new poultry capacity in South America. At the same time, retailers and restaurant chains are increasing supplier scrutiny around welfare, antimicrobial stewardship, traceability and deforestation-linked feed inputs.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
JBS S.A.	XXX	XXX	XXX	XXX
Tyson Foods, Inc.	XXX	XXX	XXX	XXX
MBRF Global Foods Company	XXX	XXX	XXX	XXX
WH Group Limited	XXX	XXX	XXX	XXX
New Hope Liuhe Co., Ltd.	XXX	XXX	XXX	XXX
Wen's Food Group Co., Ltd.	XXX	XXX	XXX	XXX
Charoen Pokphand Foods PCL	XXX	XXX	XXX	XXX
Pilgrim's Pride Corporation	XXX	XXX	XXX	XXX
Perdue Farms, Inc.	XXX	XXX	XXX	XXX
Industrias Bachoco, S.A.B. de C.V.	XXX	XXX	XXX	XXX

Source: XXX

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Poultry Meat Market Forecast, Scenarios and Growth Opportunities

The market will add USD XXX billion between 2025 and 2031. Volume growth will remain concentrated in chicken, but revenue growth will increasingly depend on mix: chilled branded packs, boneless cuts, marinated products and fully cooked formats will outpace whole birds. Emerging-market consumption gains and developed-market convenience demand therefore reinforce one another.

The central forecast assumes continuing productivity gains, moderate real feed costs and localized rather than synchronized disease disruption. A high-growth scenario would be supported by faster cold-chain investment, stronger foodservice expansion and improved veterinary market access; a downside scenario centers on persistent avian influenza, grain-market shocks and broad trade restrictions.

Winning suppliers will operate flexible plants capable of redirecting cuts across domestic retail, foodservice and export markets. They will pair cost-efficient primary processing with biosecure grower networks, multiple production geographies, recognized halal or welfare credentials and a pipeline of higher-margin prepared products.

Opportunities

- Halal-certified processing and exports to the Middle East, Africa and Southeast Asia
- Ready-to-cook, marinated and fully cooked poultry formats
- Automation, vision grading and data-led yield optimization
- Antibiotic-responsible, higher-welfare and traceable product tiers
- Local processing capacity in import-dependent emerging markets
- Valorization of dark meat, offal and processing by-products

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