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Report Highlights:

Chicken meat production in the UAE is projected to rise steadily, reaching 75,000 metric tons (MT) by 2026, supported by government feed subsidies, new large-scale poultry operations, and investments in agricultural technology. However, domestic output will continue to meet only about 15 percent of consumption, leaving the country heavily dependent on imports (forecast at 410,000 MT for 2026). Consumption growth, estimated at 480,000 MT by 2026, will be driven by population gains, real estate expansion, tourism, and a burgeoning gross domestic product.

Executive Summary

Production

Chicken meat production in the United Arab Emirates (UAE) is projected to grow by 7 percent in 2026, reaching 75,000 MT, which will cover only about 15 percent of domestic consumption. This growth is supported by new investments in poultry production facilities, as well as government initiatives such as feed subsidies and financing programs.

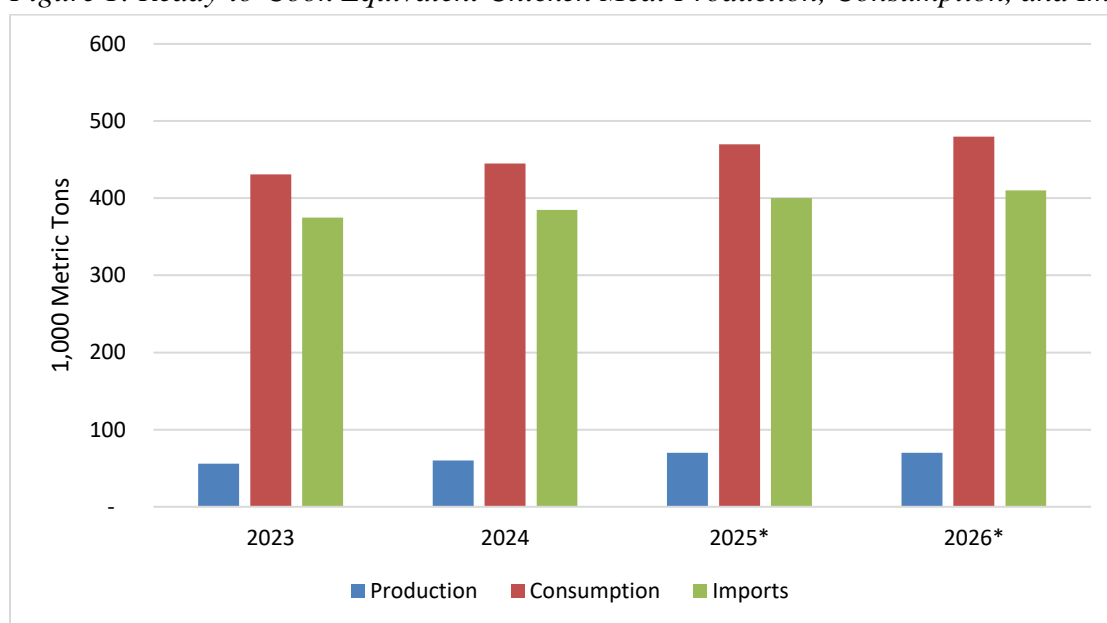
Consumption

Consumption is expected to rise modestly, reaching 480,000 MT in 2026, driven by sustained population growth, real estate development, tourism expansion, and an increasing gross domestic product. Rising demand from labor-intensive sectors, especially in major cities like Dubai and Abu Dhabi, continues to support steady growth in domestic consumption.

Imports

The UAE is forecast to import approximately 410,000 MT of chicken meat in 2026, representing a 2.5 percent year-on-year increase. Imports will remain the backbone of the UAE's poultry supply, with Brazil and the United States as leading suppliers. However, disruptions caused by avian influenza outbreaks, geopolitical tensions, and shipping challenges in the Red Sea may affect sourcing strategies and logistics costs.

Figure 1: Ready-to-Cook Equivalent Chicken Meat Production, Consumption, and Imports, 2023-2026



Notes: Not official USDA data; 2025 is estimated; 2026 is forecasted.

Production

Table 1: Chicken Meat Production, Supply, and Distribution

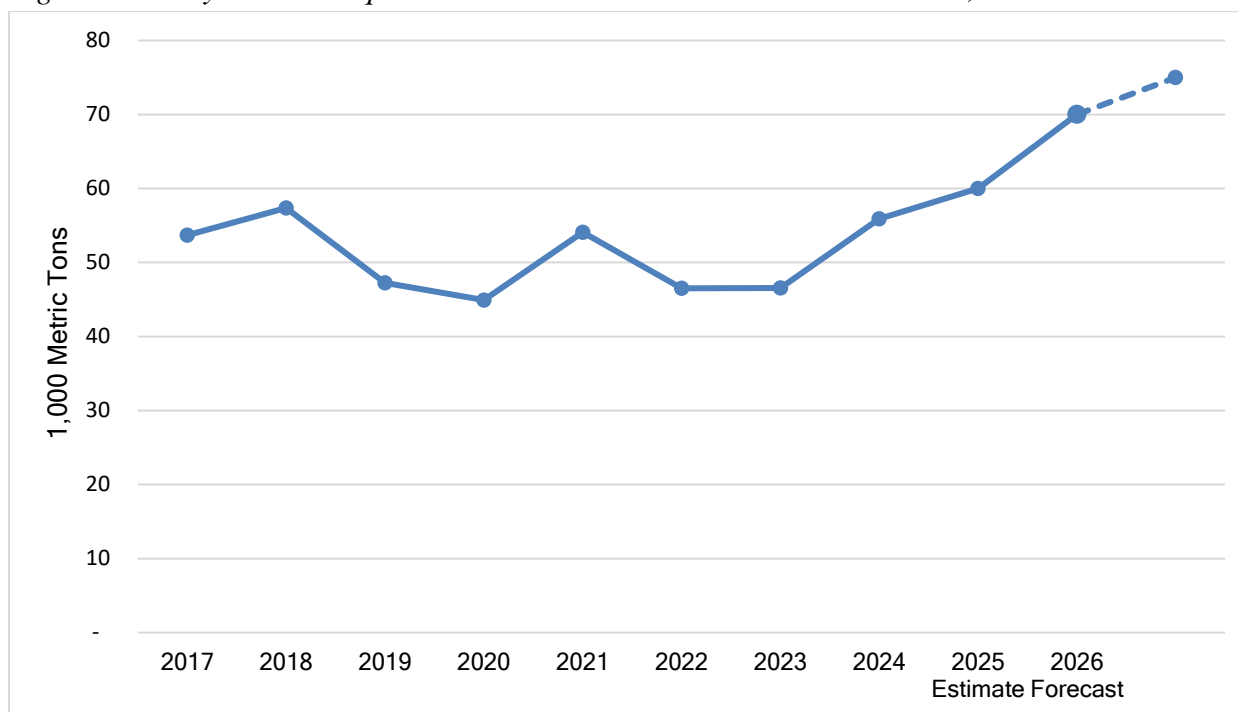
Meat, Chicken	2024		2025		2026	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
In 1,000 Metric Tons (MT) Ready-to-Cook Equivalent (RTC)	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post Forecast
Beginning Stocks	0	0	0	0	0	0
Production	60	60	70	70	0	75
Total Imports	385	385	400	400	0	410
Total Supply	445	445	470	470	0	485
Total Exports	0	0	0	0	0	0
Human Consumption	445	445	470	470	0	485
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	445	445	470	470	0	485
Total Use	445	445	470	470	0	485
Ending Stocks	0	0	0	0	0	0
Total Distribution	445	445	470	470	0	485

Notes:

- Not official USDA data.
- While privately held stocks likely exist in the UAE, USDA only reports government-held stocks or private stocks reported in official data.
- This report covers poultry product codes: HS 020711 (fresh or chilled fowls of the species *Gallus Domesticus*, not cut in pieces); HS 020712 (frozen fowls of the species *Gallus Domesticus*, not cut in pieces); HS 020713 (fresh or chilled cuts and edible offal of fowls of the species *Gallus Domesticus*); HS 020714 (frozen cuts and edible offal of fowls); and HS 160232 (meat or offal of fowls of the species “*Gallus Domesticus*,” prepared or preserved).

Post forecasts that local poultry production capacity will increase by approximately 7 percent in 2026, reaching 75,000 metric tons (MT), up from 70,000 MT in 2025, driven by new production facilities coming online and the continuation of the government’s feed subsidy program (Figure 2). Despite this growth, the UAE will remain heavily reliant on imports. This continued dependence is largely due to persistent challenges in domestic feed production, driven by water scarcity and limited arable land, which accounts for less than five percent of the country’s total area. This trend aligns with the [UAE National Food Security Strategy 2051](#), which emphasizes global food trade facilitation, import diversification, and alternative supply chain development.

Figure 2: Ready-to-Cook Equivalent Chicken Meat Production in the UAE, 2016-2026



Source: UAE Federal Competitiveness and Statistics Center; Post.

The UAE’s domestic production presently fills only about 15 percent of chicken meat consumption and relies on the international market, primarily Brazil, to supply the remaining 85 percent. Given this reliance on imports and concerns about regional security, the UAE tries to enable sustainable local food production through different initiatives.

Government Subsidies and Support

Although broiler meat has advantages over other meats in terms of production time, costs, and feed conversion efficiency, feed still accounts for between 60 and 70 percent of total production cost. The UAE, being dependent on feed imports, faces challenges in this area. Most livestock and poultry production is concentrated in Abu Dhabi where the Abu Dhabi Agriculture and Food Safety Authority (ADAFSA) launched a “[Livestock Fodder Support Program](#).” This initiative aims to provide UAE livestock and poultry producers with convenient access to high-quality feed at competitive prices, hoping to support and sustain local production. Through this program, local livestock and poultry producers purchase subsidized fodder online through the [TAMM platform](#) or at ADAFSA’s fodder distribution centers using the Agricultural Services Card. To ensure a reliable supply of high-quality feed, ADAFSA partnered with leading local companies to supply fodder, thereby enhancing the strategic stock of animal feed. Local poultry producers can then purchase feed at discounts of up to 25 percent (Table 2).

Table 2: Subsidized Feed Prices Compare to Market Prices

ADAFSA-Subsidized Price	Regular Market Price	Discount
1,600-1,900 Dirhams/Ton	2,000-2,500 Dirhams/Ton	Up to 25 percent

Source: Post

New Operations

[Al-Ghurair Foods](#)' new poultry farm opened at [Khalifa Economic Zones Abu Dhabi \(KEZAD\)](#). As one of the largest egg producers in the UAE, Al-Ghurair is investing over one billion dirhams (about \$272 million) in this new 68-hectare facility that is expected to become operational in 2025. The operation will focus on raising broilers with an estimated annual production capacity of approximately 10,000 MT. This broiler operation will be followed by a starch processing plant, the first of its kind in the region, and other projects within the Abu Dhabi Food Hub at KEZAD. According to KEZAD, this partnership is built on a common vision to support the UAE's domestic food security.

The Sharjah Agriculture and Livestock Production Establishment, known as "Ektifa," is owned by the [Department of Agriculture and Livestock of the Government of Sharjah](#), and launched a new free-range organic poultry production facility in July 2025. Operating under the brand name "Fili Poultry," the facility's production capacity is expected to reach 15,000 birds per day by 2026, contributing an estimated 4,000 MT of chicken meat annually, approximately 6 percent of the UAE's market production capacity (Figure 3).

Figure 3: Fili Poultry Marketing



Image Credit: Ektifa

[Al Ain Farms Group \(AAFG\)](#) was officially launched at the "[Make it in the Emirates](#)" Forum 2025 as the UAE's national food champion. AAFG brings together five prominent local brands including Al Ain Farms, Marmum Dairy, Al Ajban Chicken, Golden Eggs, and Saha Arabian Farms under one unified entity. Supported by two major UAE-based investment companies, [Ghitha Holding](#) and [Yas Holding](#),

AAFG aims to become a regional leader in protein and beverage production. Its five-year strategic plan focuses on scaling operations, fostering innovation, and promoting sustainable practices to enhance national food security and industry resilience.

Figure 4: Launch of the Al Ain Farms Group



Image Credit: ZAWAY

The Emirates Development Bank (EDB) has allocated 100 million dirhams (about \$27 million) to support innovation and sustainability in the UAE's agriculture sector. The initiative aims to enhance food security and empower local growers by promoting the adoption of advanced agricultural technology. The fund is available for both greenfield and brownfield projects at competitive interest rates and is open to all nationalities operating within the UAE. Local farmers, producers, technology providers, and equipment suppliers are encouraged to benefit from this strategic initiative.

Consumption

Post forecasts chicken meat consumption to reach 480,000 MT in 2026, up nearly 2.5 percent. This consumption is driven by real estate development, population growth, tourism performance, and macroeconomic growth.

Expansion of Real Estate Development and Construction Sectors

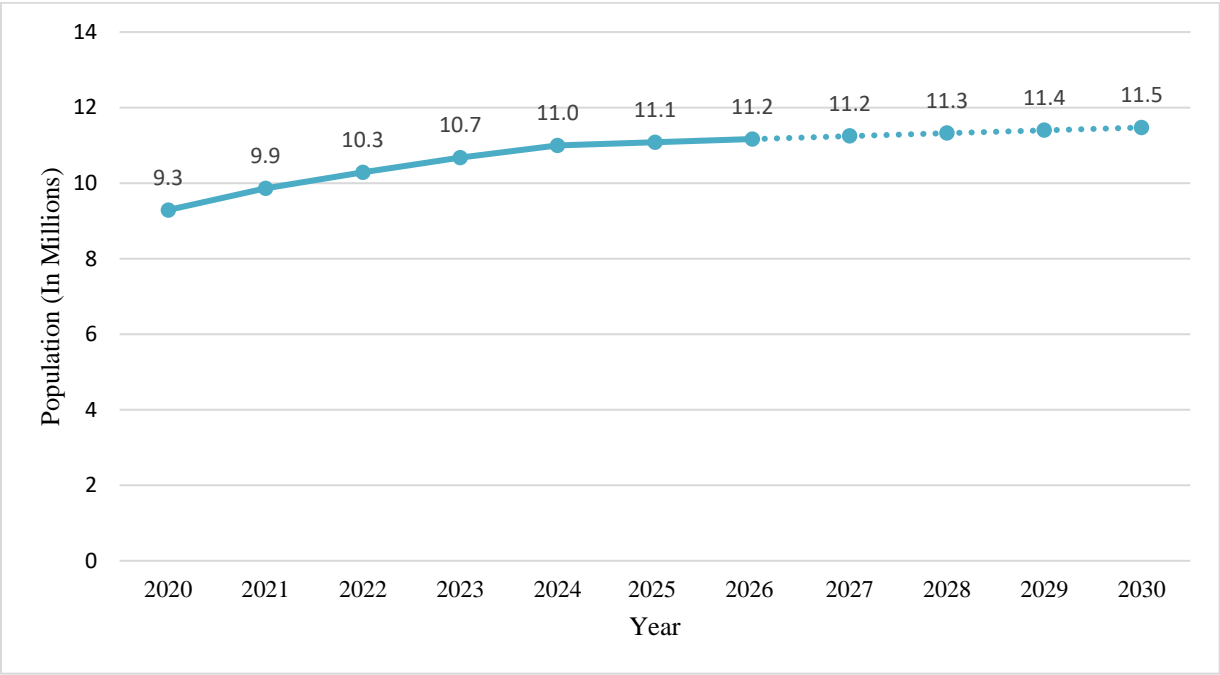
Most imported U.S. chicken meat, primarily leg quarters, is sold in bulk and consumed in worker accommodations serving labor-intensive sectors. Among these, the real estate and construction industry stands out as one of the largest in the UAE. Consequently, growth in this sector has a direct and significant impact on poultry consumption.

In 2025, the UAE’s two leading real estate markets, Dubai and Abu Dhabi, demonstrated strong performance in both off-plan and ready property segments. According to the [Dubai Land Department](#), Dubai achieved historic growth in the first half of 2025 with a 39 percent increase in the value of total investment and 25 percent increase in the value of the transactions compared to the same period last year. Similarly, Abu Dhabi’s market recorded significant growth in transaction activity during the same period, driven primarily by luxury properties and large-scale development—notably in the entertainment sector with the May 2025 [announcement of Disney Theme Park and Resort on Yas Island](#), a landmark project.

Population Growth

The UAE’s population has shown consistent growth from 2020 to 2030, increasing from 9.2 million to a projected 11.4 million, according to data from the [International Monetary Fund \(IMF\)](#) (Figure 5).

Figure 5: UAE Population Growth Forecast, 2020-2030



Source: IMF

Note: Dotted line indicates forecast

This represents an overall increase of approximately 23.5 percent over the decade. The most substantial growth occurred between 2020 and 2024, with the population rising by more than 1.7 million with an average annual growth rate of around 4.3 percent. This period likely reflects post-pandemic recovery, labor market expansion, and increased migration. From 2025 onward, population growth is expected to slow, with an increase of only 0.3 million forecast between 2025 and 2030, reflecting an average annual growth rate of less than 1 percent. This trend indicates a shift from rapid expansion to gradual demographic stabilization, with important implications for future demand in key sectors such as food, housing, infrastructure, and labor-intensive industries.

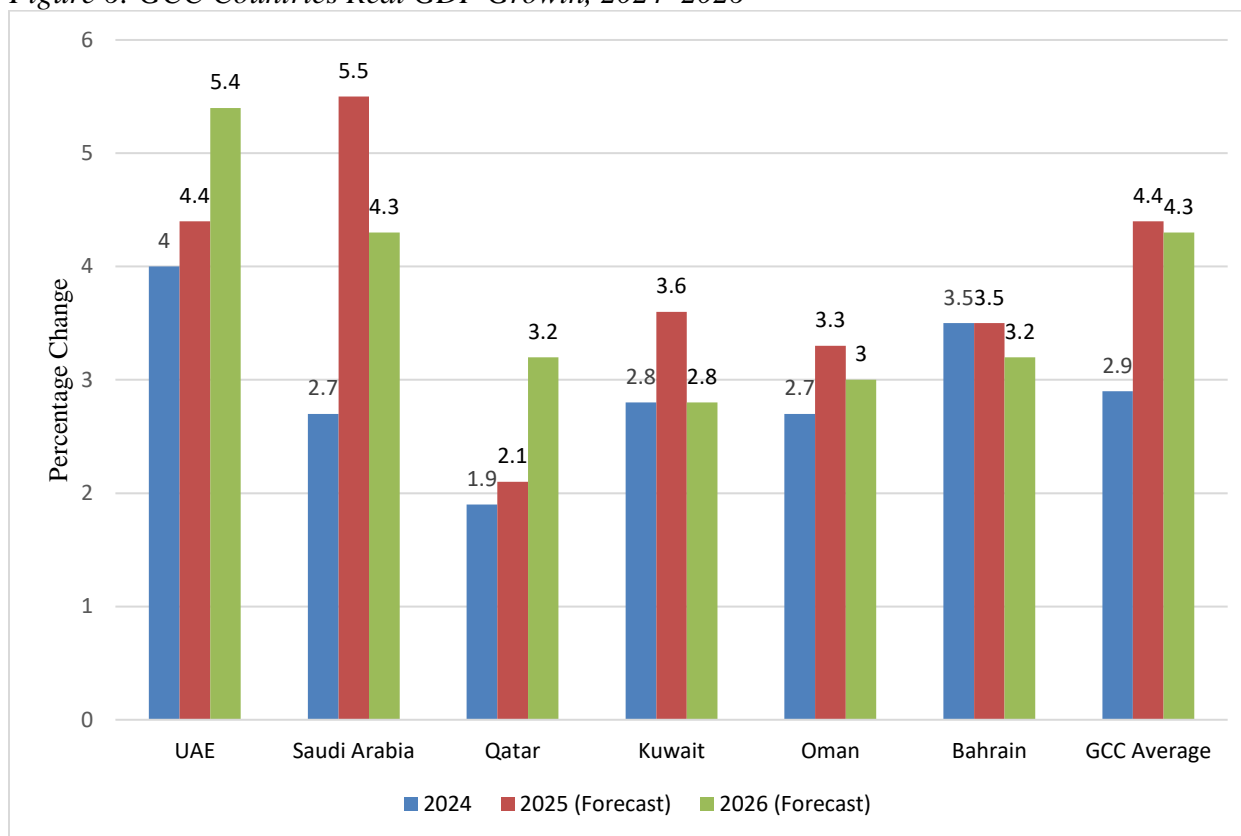
Sustained Performance of Travel and Tourism Sector

The UAE tourism industry is well-poised to continue to flourish in 2026. The [Dubai Department of Economy and Tourism](#) reports that from January to June 2025, Dubai hosted 9.8 million international overnight visitors, marking a 6 percent rise compared to the same period in previous year. The UAE in general, and Dubai in particular, continues to be a preferred destination for both business events and family holidays, due to its world-class infrastructure, exceptional safety and security, and ease of access. The UAE consistently ranks among the top countries in the [Global Safety Index](#), driven by its political stability and the effectiveness of its security policies. Citizens of more than 80 countries can visit the UAE without a visa prior to arrival, and this reduced administrative friction helps facilitate tourism. Visitors hailing from India, Oman, Saudi Arabia, United Kingdom, Europe, Russia, and the United States largely drive this dynamic.

Gross Domestic Product (GDP) Growth

According to the quarterly [Economic Review](#) of the Central Bank of United Arab Emirates, the real GDP is expected to increase by 5.4 percent in 2026 due to the strong performance of non-oil and energy sector. The UAE has demonstrated consistent and robust real GDP growth between 2022 and the 2026 forecast period, outperforming many of its GCC peers. In 2022, the UAE recorded a strong growth rate of 7.5 percent, supported by high oil prices and a rebound in non-oil sectors such as tourism, real estate, and trade. Growth moderated to 4.3 percent in 2023 due to global economic issues and regional oil production adjustments. In 2024, the UAE sustained a healthy growth rate of 4 percent, reflecting the success of its ongoing diversification efforts and investment-friendly policies. Looking ahead, the UAE is projected to grow by 4.4 percent in 2025 and accelerate to 5.4 percent in 2026, making it the fastest-growing economy among the GCC countries. This outlook underscores the UAE's economic stability and strategic positioning as a regional hub for innovation, logistics, and finance (Figure 6).

Figure 6: GCC Countries Real GDP Growth, 2024–2026



Source: Central Bank of United Arab Emirates

As a direct consequence of this economic growth, food consumption in the UAE is expected to rise steadily, fueled by increased household spending and a growing population of residents and visitors. This trend further reinforces the country’s role as a key food import and distribution center in the region.

Trade (Imports)

Post estimates that chicken meat imports for domestic consumption in the UAE will reach 400,000 MT in 2025.¹ Looking ahead, Post forecasts a modest increase to 410,000 MT in 2026, reflecting a 2.5 percent growth year-on-year. This projection assumes continued progress in de-escalating regional tensions and improving shipping conditions across key trade routes, particularly in the Red Sea.

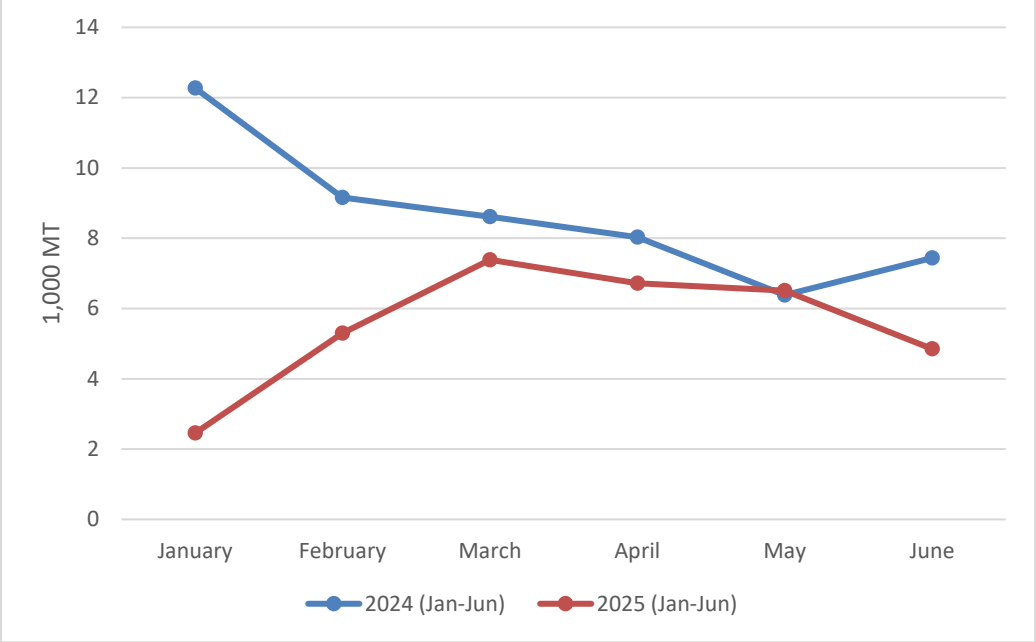
Given that approximately 85 percent of the UAE’s chicken meat consumption is imported, the same factors are driving local production—population growth, and a booming tourism sector—and boost import demand. During the first half of 2025, UAE poultry imports declined by about 5 percent compared to the same period in 2024. The most significant drops were recorded in January (16 percent) and March (15 percent), likely driven by a combination of regional shipping disruptions resulting from

¹ This figure excludes transshipments and re-exports. If transshipments and re-exports were included, total imports would be approximately 25-30 percent higher. The UAE’s role as a trading hub presents challenges for accurate data reporting.

geopolitical tension, sanitary trade barriers, and normalization in demand following the exceptionally high import volumes in 2024, which marked the highest level in the past five years.

Poultry imports from the United States to the UAE dropped sharply in the first half of 2025, from 33,200 MT compared to 51,900 MT during the same period in 2024, a decline of 36 percent. The reduction was most noticed in the early months of the year, with some signs of stabilization in the second quarter (Figure 7).

Figure 7: Ready-to-Cook Equivalent UAE Chicken Meat Imports from the United States

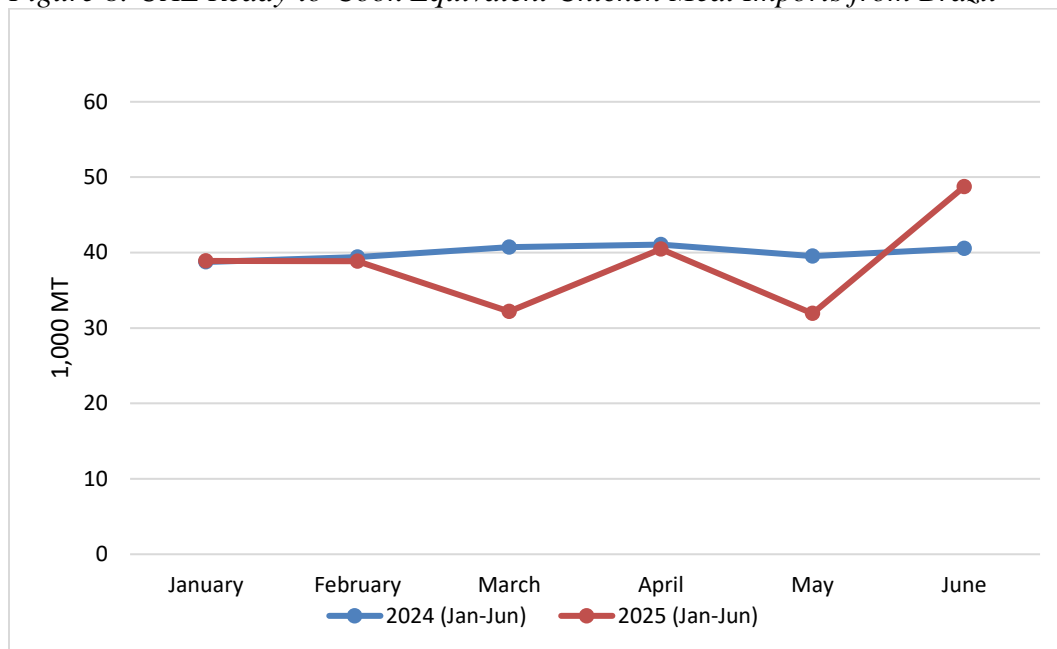


Source: Trade Data Monitor

Brazil Continues to Dominate UAE Market

Brazil is expected to maintain a dominant market share in 2025 and 2026, driven by its preferred pack sizes, competitive pricing, and the strong local presence of Brazilian companies. Poultry imports from Brazil to the UAE totaled 231,000 MT in the first half of 2025, compared to 240,000 MT during the same period in 2024, reflecting a modest 4 percent decline. Despite minor fluctuations, overall imports from Brazil remained strong, underscoring the country’s continued role as the UAE’s primary poultry supplier (Figure 8).

Figure 8: UAE Ready-to-Cook Equivalent Chicken Meat Imports from Brazil



Source: Trade Data Monitor

Although this trend reflects a gradual downward shift in overall poultry imports, Post expects the decline to primarily affect transshipments and re-exports, rather than domestic consumption. Imports intended for UAE local market are projected to rise by 2.5 percent in 2026, reflecting steady demand and market stability.

Spotlight: Brazil's Competitive Edge

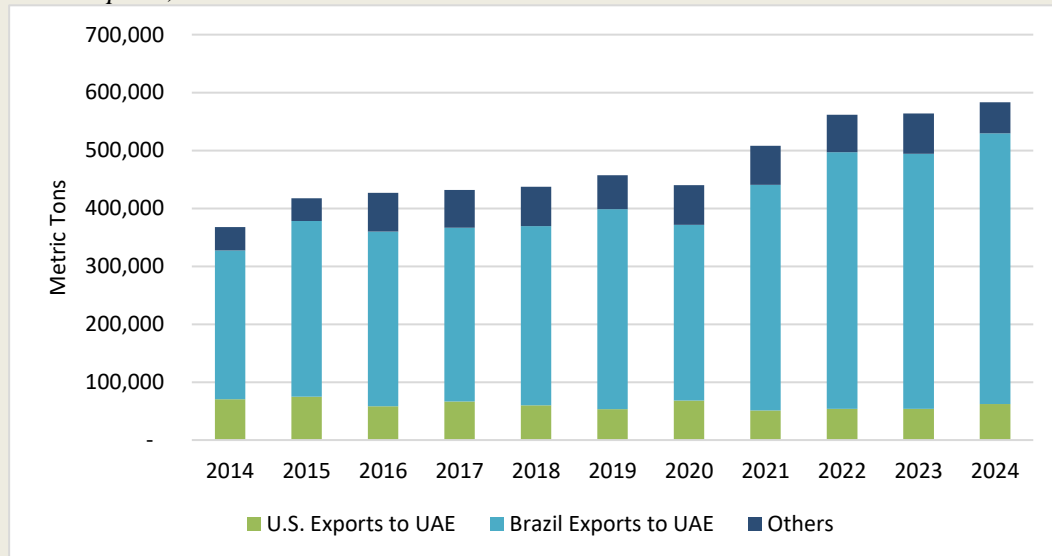
Pack Size: U.S. shipments to the UAE are mostly large supersacks of dark meat (chicken leg quarters) targeting facilities serving migrant labor, as well as major processing facilities. Local importers state that supersacks put U.S. poultry at a disadvantage compared to smaller packaging sizes available from Brazil. This is because smaller packaging can feed multiple channels (such as in the hotel, restaurant, restaurant, and institutional sector), whereas supersacks can only supply major processing facilities.

Prices: U.S. chicken meat (leg quarter) prices have increased due to elevated shipping costs and production disruptions. When the price of U.S. leg quarters reaches around 75 percent of the price of a Brazilian whole chicken, UAE demand for U.S. chicken meat begins to weaken.

Product Offering: Consumer behavior and cultural considerations play a role, as many UAE consumers may prefer a full or half chicken, which includes white breast meat, over just a leg quarter, regardless of its weight or size. Brazil offers a wider range of products compared to its competitors like the United States.

Local Presence: The presence of Brazilian processing facilities in the UAE also raises Brazil's competitiveness. For example, Brazil Foods, which exports chicken meat and describes itself as "the world's largest halal animal-protein company," opened a new factory at KIZAD. Another Brazilian poultry producer, JBS, acquired two plants in the UAE in 2022 to produce prepared foods and serve as a regional hub for halal products.

Figure 9: Major Suppliers' Market Share of the UAE's Ready-to-Cook Equivalent Chicken Meat Imports, 2014-2024



Source: Trade Data Monitor; Post

Two other major factors with an effect on 2025 imports are highly pathogenic avian influenza (HPAI) and geopolitical tensions.

HPAI Outbreaks in Brazil and the United States

Both Brazil and the United States, the UAE's two largest poultry suppliers, have experienced renewed outbreaks of HPAI in late 2024 and early 2025. The outbreaks have led to temporary export suspensions from affected regions, tighter biosecurity controls, and possible shipment delays, directly reducing available supply to the UAE. Even unaffected production zones face heightened scrutiny, regulatory compliance issues, and increased certification requirements, further slowing trade.

Geopolitical Tensions Strain Shipping Routes

The escalation of hostilities between Iran and Israel since early 2025 has introduced considerable volatility in regional trade routes, including the Strait of Hormuz and the Gulf of Aden (Figure 10). Simultaneously, the ongoing conflict in Yemen and Houthi attacks on commercial vessels in the Red Sea, have deterred major shipping lines from transiting the Suez Canal, forcing rerouting via the Cape of Good Hope. These changes have extended shipping times, increased freight costs, and reduced shipping frequency, critical for chilled and frozen poultry logistics.

Figure 10: Houthi Controlled Area and Bab Al-Mandab Strait



Source: Central Intelligence Agency World Factbook

In July 2025 following the sinking of two vessels by Houthi forces, shipping lines have faced a sharp [increase in insurance costs for shipments through the Red Sea](#), with war risk premiums rising from 0.3

percent to between 0.7 percent and 1 percent of the ship's value. This escalation has added considerable pressure to transportation expenses, affecting the cost of poultry imports to the UAE. The outlook for 2026 is highly scenario dependent: Return to stable trade conditions could restore import volumes, but ongoing risks may permanently reshape the UAE's poultry sourcing strategy.

Developing World's Largest Logistics Hub for Foodstuffs in Dubai

Sheikh Mohammed bin Rashid Al Maktoum, Dubai's ruler, announced on July 10, 2024, the creation of the world's largest logistics hub for foodstuffs, fruit, and vegetable trade. This facility aims to become the world's largest market for these products. Dubai Municipality and ports operator [DP World](#) are collaborating to develop this global logistics hub, which will be managed by DP World and connected to international markets. This initiative aligns with Dubai's strategic goals to boost investment and economic opportunities, contributing to the [Dubai Economic Agenda D33](#). The agenda aims to double the size of Dubai's economy and position it among the top three global cities by 2033. The project also supports the UAE's efforts to enhance food security and improve the entire food value chain.

Policy

UAE Introduces New Price Control Decrees for Poultry and Other Essential Goods

Effective January 2, 2025, three new Ministerial Decrees issued by the UAE Ministry of Economy aim to strengthen consumer protection and ensure market stability. [Decree No. 246/2024](#) regulates price increases for nine essential goods (including cooking oils, eggs, dairy, rice, sugar, poultry, legumes, bread, and wheat) by requiring prior ministry approval and establishing a monitoring team to oversee changes and handle complaints. [Decree No. 245/2024](#) mandates large retail and online outlets to display unit prices using standardized measurements, enhancing price transparency and enabling informed consumer choices. [Decree No. 247/2024](#) introduces a code of conduct to govern ethical and transparent relationships between suppliers and retailers in the consumer goods sector. Together, these decrees aim to establish an enforcement framework to control prices, improve oversight, and promote fair competition in the market.

Technical Regulation for Animal Slaughtering According to Islamic Rules

On November 30, 2022, the UAE published the updated mandatory technical regulation [UAE.S. 993/2022 "Animal Slaughtering Requirements According to Islamic Rules,"](#) with an effective date of December 1, 2023. The new technical regulation, also known as the "halal standard," replaces regulation UAE.S. 993/2015. The new regulation allows for poultry stunning if it will not lead to death or stop the animal's heart from beating, or if it reduces the amount of bleeding before the slaughter. An Islamic slaughter certificate (called "Halal") is required for export to the UAE. The exporter must obtain a halal certificate from an approved halal certifier. The U.S. Department of Agriculture (USDA) Food Safety and Inspection Service's [export library](#) provides additional guidance for U.S. exports. U.S. exporters may obtain additional guidance from USDA's Food and Agricultural Import Regulations and Standards [annual report](#).

Attachments:

No Attachments