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Report Highlights:

The poultry market in the United Arab Emirates is expected to rebound in 2027, assuming regional trade and shipping conditions normalize and the disruptions that affected import flows in 2026 ease. Chicken meat consumption is forecast to recover to 485,000 MT while imports for domestic consumption are projected to reach 410,000 MT. This is supported by improved trade conditions and continued growth in the construction and hotel, restaurant, and institutional sectors. Local poultry production is expected to remain stable, leaving imports as the primary source for growing consumer and food service demand.

Executive Summary

Production

UAE chicken meat production is expected to remain at approximately 75,000 metric tons (MT) in 2027, with domestic production continuing to meet just 15-18 percent consumption. Elevated production costs, limited arable land, and climate constraints will continue to limit expansion.

Consumption

Chicken meat consumption is forecast to recover to 485,000 MT in 2027, supported by the normalization of poultry trade flows and continued demand from the construction, tourism, and hotel, restaurant, and institutional sectors. Consumption is estimated at 425,000 MT in 2026, 10 percent below 2025, primarily due to temporary disruptions in poultry import flows following regional geopolitical turmoil and disruptions to shipping through the Strait of Hormuz.

Imports

Chicken meat imports for domestic consumption are forecast to increase from 350,000 MT in 2026 to 410,000 MT in 2027, representing approximately 17 percent growth. Import flows are expected to recover as regional shipping conditions improve, supported by alternative routes through the ports of Khorfakkan and Fujairah and the UAE's expanding logistics infrastructure.

Production

Table 1: Chicken Meat Production, Supply, and Distribution

Meat, Chicken	2025		2026		2027	
Market Year Begins	Jan 2025		Jan 2026		Jan 2027	
In 1,000 Metric Tons (MT) Ready-to-Cook Equivalent (RTC)	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks	0	0	0	0	0	0
Production	70	70	75	75	0	75
Total Imports	400	400	375	350	0	410
Total Supply	470	470	450	425	0	485
Total Exports	0	0	0	0	0	0
Human Consumption	470	470	450	425	0	485
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	470	470	450	425	0	485
Total Use	470	470	450	425	0	485
Ending Stocks	0	0	0	0	0	0
Total Distribution	470	470	450	425	0	485

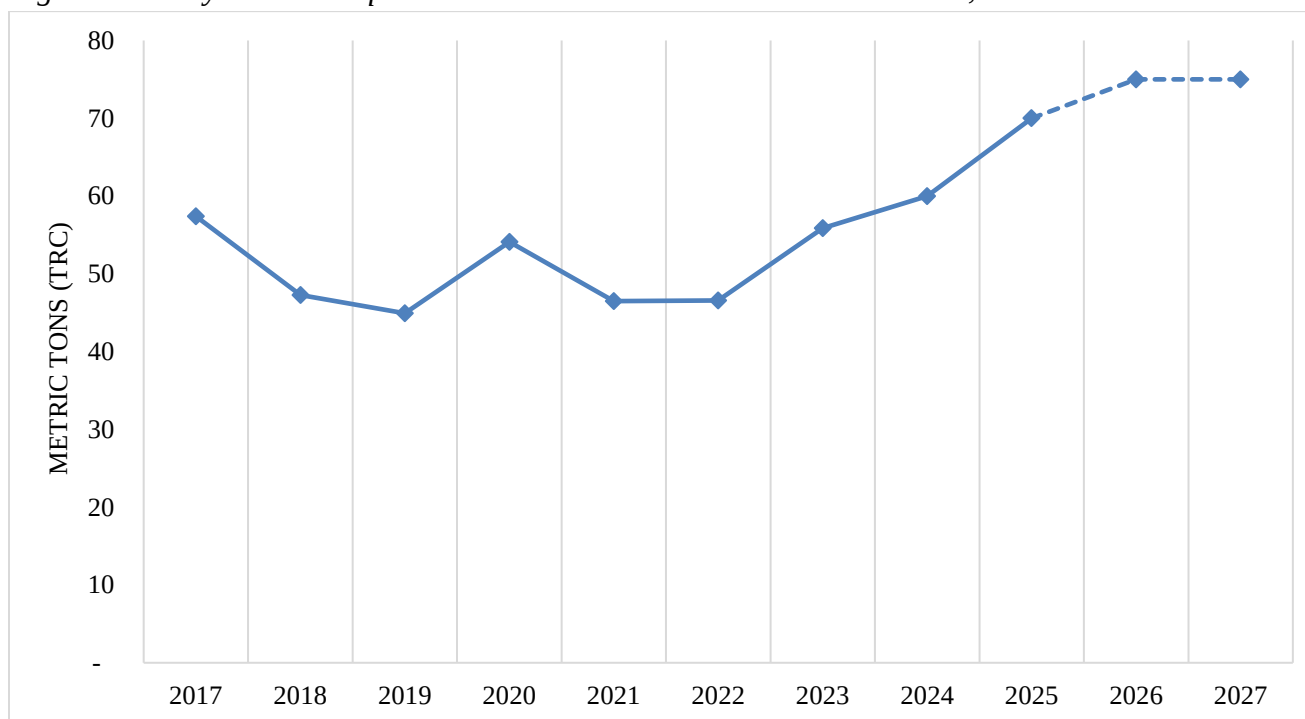
Notes:

- Not official USDA data.
- Although 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 remain unchanged at 75,000 metric tons (MT) in 2027, the same level as the 2026 estimate. Domestic production is expected to remain constrained by high production costs, including feed,¹ energy, and geopolitical instability, as well as limited arable land availability (Figure 1). Consequently, local production will continue to satisfy only about 15-18 percent of chicken meat consumption and relies on the international market, primarily Brazil and United States, to supply the remaining 85 percent of domestic demand, with imports accounting for most of the chicken consumption.

¹ [UAE Grain and Feed Annual Report 2026](#).

Figure 1: Ready-to-Cook Equivalent Chicken Meat Production in the UAE, 2017-2027



Source: UAE Federal Competitiveness and Statistics Center; Post.

Notes: Dotted line means forecasted.

The UAE is a tropical desert climate with extreme annual temperatures and scarce water resources. It relies heavily on thermal desalination to satisfy potable water consumption and has access to some ground and surface water during the winter season. As a result, climate restricts the UAE from developing a viable domestic agricultural sector and, subsequently, the UAE depends upon agricultural imports to meet local demand. This aligns with the national food security strategy, which emphasizes global food trade facilitation, import diversification, and alternative supply chain development.²

New Premium Grading System for Locally Produced Chicken

The Abu Dhabi Quality and Conformity Council, in collaboration with the Abu Dhabi Agriculture and Food Safety Authority, launched the Premium Food Mark for locally produced chilled chicken products during the “Make it in the Emirates 2026” event. The initiative establishes an advanced conformity framework with technical standards exceeding existing UAE requirements, covering the entire poultry value chain, including farming, feed practices, slaughtering, processing, packaging, and distribution. The program incorporates requirements related to animal welfare, sustainability, and final product quality, with a classification system that assigns quality tiers to products meeting the standards. Products awarded the mark will undergo conformity assessment and certification processes to ensure continued compliance. The initiative aims to enhance consumer confidence, encourage higher production standards, and improve the competitiveness and sustainability of the local poultry sector. The quality tiers and official graphic vector of the new logo have not yet been publicly released.

² <https://u.ae/en/about-the-uae/strategies-initiatives-and-awards/strategies-plans-and-visions/environment-and-energy/national-food-security-strategy-2051>

Consumption

Post estimates UAE chicken meat consumption at 425,000 MT in 2026, down 10 percent from 2025, reflecting temporary disruptions to poultry import flows caused by regional geopolitical instability. Consumption is forecast to recover to 485,000 MT in 2027, assuming a resolution of regional geopolitical tensions and the normalization of trade flow in the GCC region. Most imported U.S. chicken meat, primarily leg quarters, is sold in bulk and consumed in worker accommodations serving labor-intensive sectors, particularly the real estate and construction, the largest such sector in the UAE, as well as the tourism, and hotel, restaurant, and institutional (HRI) sector. Consequently, growth and stability in these sectors have a direct and significant impact on chicken meat consumption.

Real Estate Sector

Dubai's real estate market remained resilient during the first half of 2026 despite heightened regional geopolitical tensions. According to the Dubai Land Department, total real estate transactions increased 31 percent year-on-year in the first quarter of 2026, reflecting continued investor confidence. However, private sector analysis indicated that geopolitical uncertainty weakened buyer sentiment in Quarter 2, contributing to a 16 percent decline in residential transaction value during the first half of the year compared to the previous year. Despite this moderation, no significant reduction in construction employment or worker populations existed, suggesting that underlying demand for bulk poultry remained relatively stable. Supply-chain disruptions, higher logistics costs, and transportation challenges associated with the regional conflict were therefore the primary factors constraining poultry imports.

Tourism Sector

The UAE's hospitality and tourism sector experienced temporary disruption during the first half of 2026 due to regional geopolitical tensions. Although the Dubai Department of Economy and Tourism has not yet updated its report data from the first half of the year,³ available industry assessments indicate that the hospitality sector experienced a temporary slowdown in the second quarter of 2026 amid heightened regional geopolitical tensions. Dubai received more than two million international visitors in January, an increase of 3 percent compared with January 2025 while hotel occupancy averaged around 85 percent. However, geopolitical conflict in the region coupled with airspace closures and flight disruptions that began in late February affected transit and international travel through Quarter 2 of 2026, dampening demand—with some international hotel groups reporting a 30 percent revenue decline. However, Dubai's hospitality sector remained relatively resilient compared with broader regional markets, supported by domestic tourism, government support, business travel, and the gradual recovery of airlines connectivity. The temporary slowdown may have affected demand through the HRI channels, but supply chain and logistics disruptions were the more significant factors affecting poultry imports.

Hotel, Restaurant, and Institutional Sector

In 2025, USDA had projected the HRI sector to grow to approximately \$20.6 billion by 2029, driven by continued consumer demand for convenience, diverse international cuisines, and higher-end dining

³ <https://www.dubaidet.gov.ae/en/research-and-insights/tourism-performance-report-january-2026>

experiences.⁴ Food service sales reached \$17.8 billion in 2024, with more than 17,300 outlets operating across a diverse and competitive market. Dubai remains the UAE's leading food service and hospitality hub. The 2024 Dubai Gastronomy Industry Report recorded the licensing of approximately 1,200 new restaurants during the year, while 19 restaurants received Michelin stars.⁵

Dubai's position as a major destination for business events, conferences, and international exhibitions further supports demand across the hospitality and food service sectors, despite recent geopolitical tensions. The Dubai World Trade Centre attracted more than 2.9 million visitors in 2025 across more than 500 events. The emirate's hospitality infrastructure includes more than 820 hotels with over 150,000 rooms. In addition, USDA's Hotel Restaurant Institutional Annual report indicates that the emirate has approximately 8,617 restaurants, 5,240 coffee shops and cafeterias, and 467 hotels, underscoring the scale and diversity of its food service and hospitality industry.⁶ Taken together, these developments indicate that Dubai's expanding hospitality and food service infrastructure will continue to support demand for poultry products.

Demographics and Poultry Consumption Patterns

According to the United Nations Population Fund, the UAE's population reached approximately 11.4 million in 2025.⁷ Data from industry consultations and foreign consular registration records indicate that the UAE's expatriate-dominated population structure has a significant influence on national protein consumption, poultry cut preferences, and retail market segmentation. Distinct demographic groups contribute to different culinary preferences and procurement patterns across the UAE poultry market:

- *Indian and Pakistani communities (55 percent of the population):* Generate substantial, volume-driven demand for imported dark meat, particularly bone-in leg quarters cut in small cubes. These cuts are commonly used in rice-based dishes such as biryani and in curries, contributing to the strong demand for frozen leg quarters in the market.
- *Filipino community (7 percent):* Support consistent demand for individual bone-in chicken cuts, including drumsticks, thighs, and wings. These products are widely used in fried-chicken preparations and are commonly served with rice or noodles, supporting demand across both retail and food-service channels.
- *Arab communities (22 percent):* Tend to show stronger demand for whole and half chickens, particularly for grilled and charcoal-grilled preparations. This segment contributes significantly to demand for whole birds and supports sales of fresh and chilled locally produced broilers.

Ramadan

Ramadan is expected to provide a significant seasonal boost to poultry consumption in the UAE. Ramadan 2027 is expected to begin on February 8 and last approximately 30 days. Approximately 76

⁴ <https://www.fas.usda.gov/data/gain/2025/12/united-arab-emirates-food-service-hotel-restaurant-institutional-annual>

⁵ <https://www.dubaidet.gov.ae/en/research-and-insights/gastronomy-industry-report-december-2024>

⁶ <https://www.fas.usda.gov/data/gain/2025/12/united-arab-emirates-food-service-hotel-restaurant-institutional-annual>

⁷ <https://www.unfpa.org/data/world-population/AE>

percent of the UAE's total population is Muslim, while the remaining 24 percent is non-Muslim.⁸ Poultry is widely used in traditional Ramadan meals; demand for chicken is expected to increase significantly during the month, particularly in the retail and food-service sectors. Food service and institutional kitchens, particularly those serving large worker accommodations, are also expected to experience higher demand during Ramadan. The increased frequency of meal preparation and expanded charitable food distribution during Ramadan period are expected to further support poultry demand. UAE importers typically begin building inventories well in advance of Ramadan and are expected to place orders as early as October and November 2026 for shipments arriving in December and early January, allowing sufficient time to build stocks ahead of the peak demand period. Poultry exporters are likely to see increased purchasing interest beginning in the fourth quarter of 2026, with demand expected to strengthen as Ramadan approaches and continue during the peak event season.

Trade (Imports)

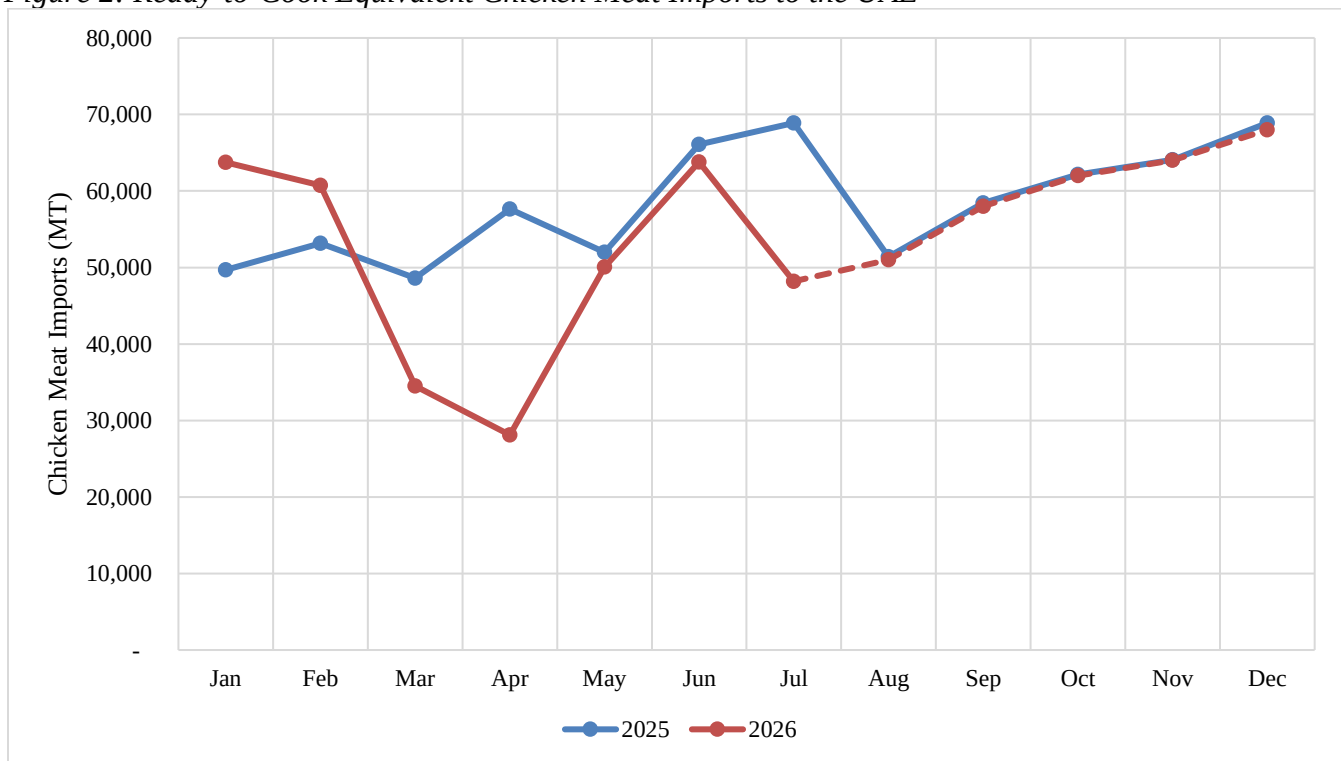
Post forecasts a considerable increase to 410,000 MT in 2027, reflecting about 17 percent growth year-on-year. This projection reflects continued adaptation of regional trade flows to disruptions affecting key shipping routes, with imports increasingly supported by alternative and non-traditional routes, particularly around the Strait of Hormuz and the Red Sea. For the remainder of 2026, Post estimates that chicken meat imports for domestic consumption in the UAE will reach 350,000 MT in 2026, excluding transshipments and re-exports. If transshipments and re-exports were included, total import volumes could be higher. However, transshipments and re-export flows in and out of the country make it challenging to accurately and consistently capture timely data on these movements.

UAE total poultry meat imports, including transshipment and re-exports, declined by approximately 8 percent year-on-year during the first half of 2026, reaching 301,000 MT compared with 327,000 MT during the same period in 2025. The decline was concentrated in the second quarter, when imports fell approximately 19 percent from the previous year, following relatively strong performance in the first quarter. The significant reduction in Quarter 2 reflects the impact of regional geopolitical tensions, shipping disruptions, and higher freight costs. These constrained poultry trade and procurement during the period.

Despite the decline in the first half of 2026, imports remained substantial, averaging more than 50,000 MT per month—including transshipment and re-exports, underscoring the UAE's continued reliance on imported poultry to meet domestic demand. Post expects trade flows to gradually recover during the second half of 2026 and return to levels broadly comparable to 2025 by the end of the year, as shipping conditions improve and regional trade routes stabilize (Figure 2). This recovery is expected to be supported by seasonal demand ahead of Ramadan and increased activity in the hospitality and food-service sectors.

⁸ <https://2021-2025.state.gov/reports/2023-report-on-international-religious-freedom/united-arab-emirates/>

Figure 2: Ready-to-Cook Equivalent Chicken Meat Imports to the UAE

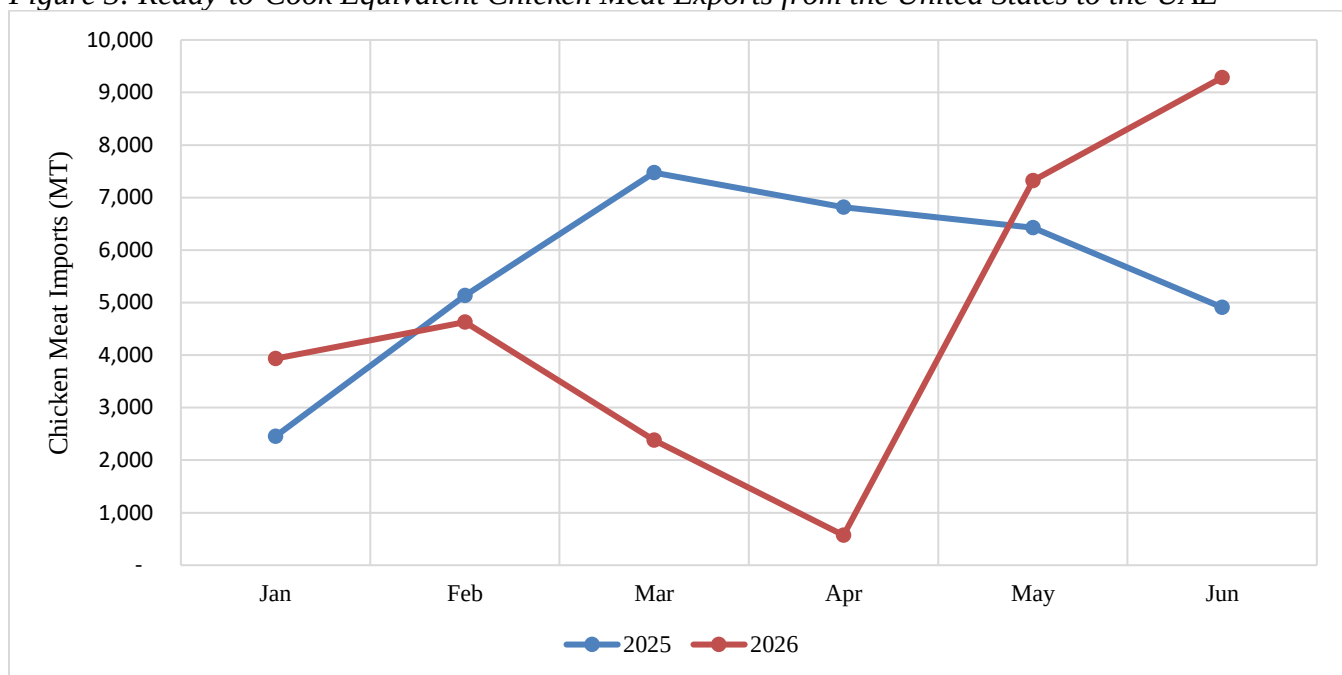


Data Source: TDM

Notes: Dotted line means forecasted; figures include transshipments and re-exports.

U.S. chicken meat exports to the UAE, including transshipments and re-export, declined by approximately 15 percent during the first half of 2026 compared to the previous year. The decline was primarily concentrated in Quarter 1, when imports fell approximately 27 percent, reflecting disruptions to trade flows during the peak of geopolitical tensions in the GCC region, particularly in February and March. However, the trend improved significantly in the second quarter, with imports declining by only approximately 5 percent compared to the previous year (Figure 3).

Figure 3: Ready-to-Cook Equivalent Chicken Meat Exports from the United States to the UAE



Data Source: TDM

Note: Figures include transshipments and re-exports.

Shipping and Logistics

The recovery toward the end of the first half of the year was supported by the activation of alternative shipping routes through Khorfakkan and Fujairah ports. These ports are located outside the Strait of Hormuz and provide an alternative to routes directly affected by disruptions in the Strait (Figure 4). UAE is the only Gulf state with shores on both the Arabian Gulf, beyond the Strait of Hormuz, and the Gulf of Oman, on the open side of the Strait of Hormuz. In addition, shippers have several overland alternatives for moving cargo into the UAE. First, shippers can route cargo to one of Oman's three main seaports (Sohar, Duqm, and Salalah) and then use trucks to transport containers into the UAE. Second, shippers can route cargo to one of Saudi Arabia's Red Sea ports, such as King Abdullah Port or Jeddah Islamic Port, followed by trucking the goods to the UAE.

DP World and the Fujairah Ports Authority are in advanced negotiations to finalize a 50-year concession to build two new port facilities at Al Rugaylat and Dibba on the UAE's east coast.⁹ The project would create a new deep-water gateway that can take the largest modern container vessels. Al Rugaylat would handle up to 2.5 million TEUs, 1.7 million tons of general cargo, and 190,000 CEUs a year. Dibba would add 3.6 million tons of general cargo capacity a year. The ports would connect to DP World's Jebel Ali port, the Jafza free zone, and its inland logistics network to provide importers additional entry points for routing cargo to the market.

⁹ <https://www.dpworld.com/en/news/dp-world-to-expand-uae-gateway-network-with-new-fujairah-terminals>

Figure 4: UAE Seaports

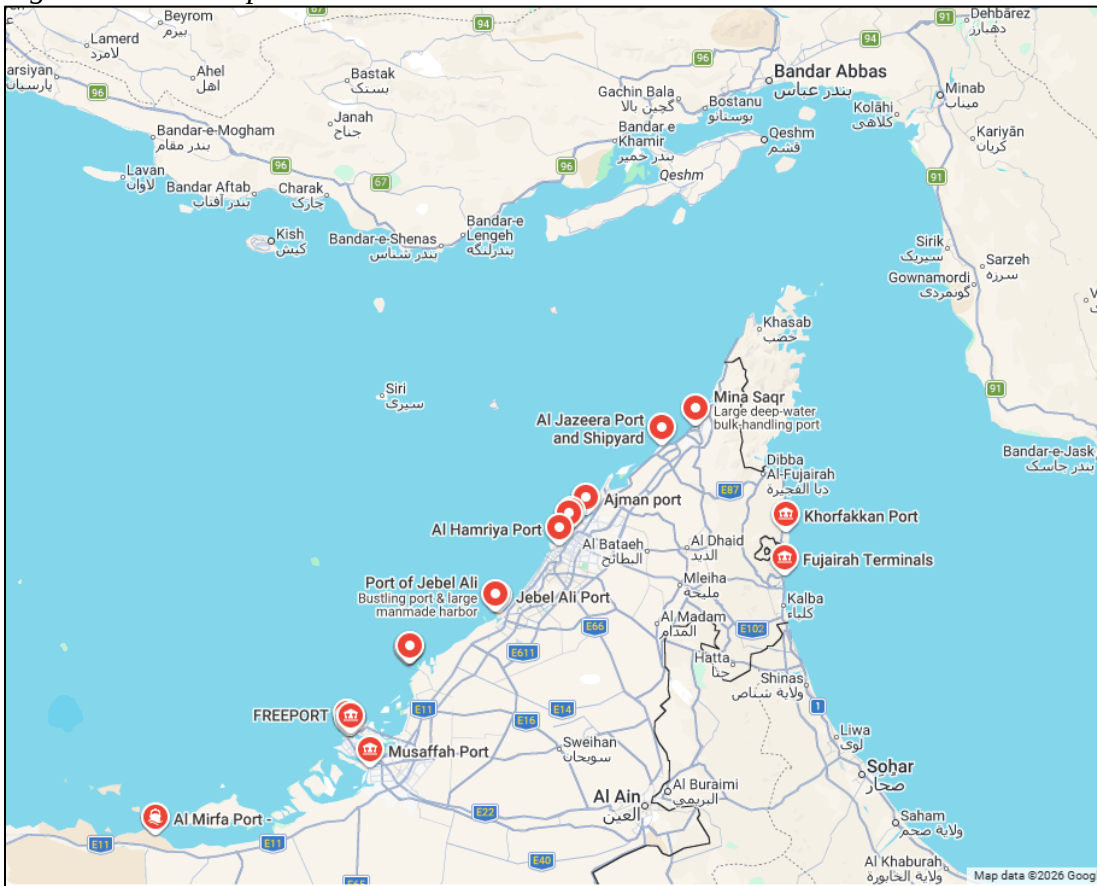


Image Credit: Google Maps

Sharjah's Ports, Customs and Free Zones Authority highlighted the strategic role of Khorfakkan Port as a key maritime gateway on the UAE's east coast, with direct access to international shipping routes through the Gulf of Oman.¹⁰ The port forms part of an integrated logistics ecosystem connecting maritime facilities, logistics complexes, border crossings, transport networks, and regional trade corridors. With deep-water berths and advanced cargo-handling infrastructure, Khorfakkan Port currently has an annual capacity of approximately 3.5 million containers, with plans to expand capacity to five million containers and a longer-term target of 10 million, strengthening the UAE's trade connectivity and supply chain resilience.

A third option is the UAE's Etihad Rail network, which provides a 900-kilometer national railway connecting all seven emirates, from Al Sila in the west to Fujairah on the UAE's east coast (Figure 5). The rail network provides an additional inland connection between the UAE's western and eastern seaboards and can facilitate the movement of containerized cargo between ports and inland logistics hubs, providing greater flexibility in the event of disruptions affecting maritime routes through the Strait of Hormuz.

¹⁰ <https://www.wam.ae/en/article/c1rhj30-%25E2%2580%2598from-khorfakkan-opportunities-begin%25E2%2580%2599-sharjah>

Figure 5: Etihad Rail Network

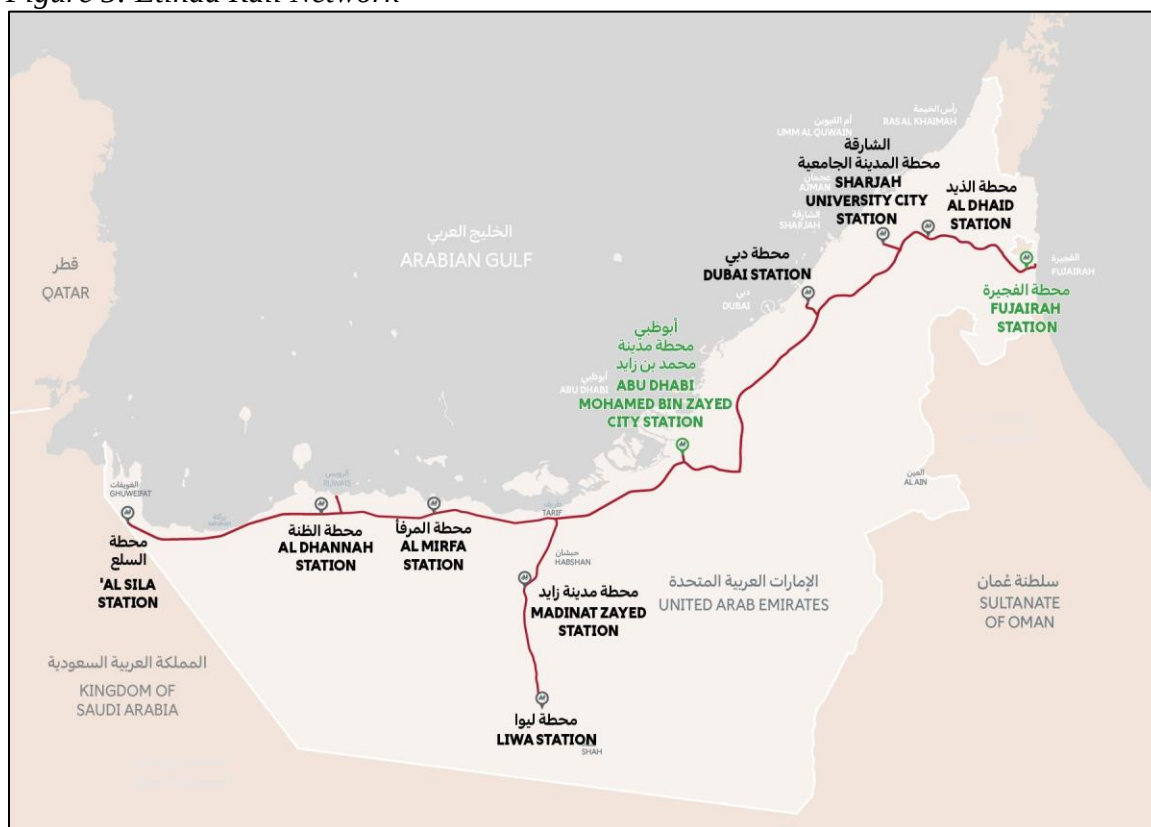


Image Credit: Etihad Rail

Taken together, the increased logistics enhancements and investments should aid poultry shipments. Khorfakkan in particular has become increasingly important as an alternative gateway for imported frozen poultry, particularly during periods of disruption to shipping through the Strait of Hormuz. The port provides importers with greater flexibility in routing poultry shipments into the UAE and supports the continuity of supply to the domestic market.

Policy

Temporary Customs Facilitation

To support shipping and maintain the flow of trade during recent geopolitical disruption to the region, the UAE government introduced several measures to facilitate the movement of cargo through alternative routes. On March 8, 2026, Dubai Customs issued Notice No. 3/2026, introducing temporary customs facilitation for cargo destined for Jebel Ali Port and Dubai Free Zones via Khorfakkan and Fujairah ports.¹¹ Under the measure, containers arriving at Khorfakkan or Fujairah can be transported by road directly to Jebel Ali Port and the Free Zones without undergoing standard customs clearance at the initial port.

¹¹ <https://www.dubaicustoms.gov.ae/en/PoliciesAndNotices/Pages/NOTICES.aspx>

On March 12, 2026, Dubai Customs also issued Notice No. 4/2026, officially launching a “Green Corridor” between Dubai and the seaports of Oman to enhance supply chain efficiency and facilitate cross border trade via land routes.¹² The initiative introduced harmonized customs procedures for goods entering or leaving Dubai’s local markets and free zones through Omani ports, supported by coordinated inspection and clearance processes at designated border crossings, including Al Wajajah and Hatta.

Technical Regulation for Animal Slaughtering

UAE regulations allow 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.¹³ An Islamic (“halal”) slaughter certificate 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.¹⁴ U.S. exporters may also find additional guidance in USDA’s Food and Agricultural Import Regulations and Standards annual report.¹⁵

Attachments:

No Attachments

¹² <https://www.dubaicustoms.gov.ae/en/PoliciesAndNotices/Pages/NOTICES.aspx>

¹³ <https://moiat.gov.ae/en/programs/halal>

¹⁴ <https://www.fsis.usda.gov/inspection/import-export/import-export-library/united-arab-emirates>

¹⁵ <https://www.fas.usda.gov/data/gain/2025/11/united-arab-emirates-fairs-country-report-annual>