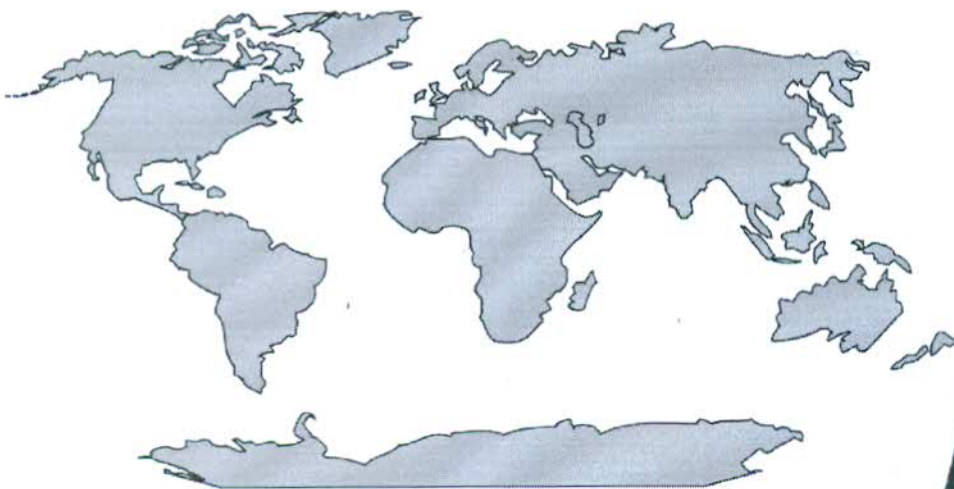


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PROSPECTS AND GROWTH OF POULTRY INDUSTRY IN SAUDI ARABIA – A STUDY

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ABSTRACT

In Saudi Arabia, poultry industry has made tremendous growth during the last few decades, which emerged from backyard ventures to a fully profitable industrial business.

Saudi Arabia is the biggest importer of the agricultural & food products among all other Gulf Cooperation Council (GCC) countries. The kingdom has approximately double population than other five GCC states I. e. UAE, Qatar, Bahrain, Kuwait and Oman.

Broiler meat production in Saudi Arabia has reached 670,000 MT in 2016. It is four percent higher than the previous year. Broiler production of Saudi is estimated to here after increase to 700,000 MT in 2017. This growth in local production is because of current modification in broiler meat the production operation by the 3 most important producers of Saudi poultry.

The import of boiler has decreased to 940,000 MT in 2016. There is a 2% decrease when compared the previous year. Brazil is the leading exporter with 85% of the Saudi broiler meat import market with 789,302 MT. The second is France with 14% share of market and 1 percent with the U.S. In the recent year, Saudi Arabia exported Broiler meat of 40,000 MT mostly to the countries of GCC.

The production of livestock has to be increased to provide the basic nutrients required for the balanced growth of human body. The government has to intervene and support the local production of feed and raw materials because of the increase in the demand of supply of livestock production. The sector needed feed supply to cater for the growing numbers of birds therefore cultivation, production and importation of feed-mill ingredients should be made available by the government.

Keywords: Poultry, Chicken, Livestock, Saudi Arabia

1. INTRODUCTION

The present research attempts to study the role of Poultry Industry in Saudi Arabia. Several studies at various national and international levels on different aspects of the industries have been conducted by researchers, academicians and institutional agencies. Therefore it is quiet relevant to review the available literature that has relevance in identifying the gaps that exist in the field of Poultry Industry.

Saudi Arabia, poultry industry has made tremendous growth during the last few decades, which emerged from backyard ventures to a fully profitable industrial business.

Saudi Arabia is the biggest importer of the agricultural & food products among all other Gulf Cooperation Council (GCC) countries. The kingdom has approximately double population than other five GCC states I. e. UAE, Qatar, Bahrain, Kuwait and Oman.

2. OBJECTIVE OF THE STUDY

- To study the poultry sector in Saudi Arabia.
- To study the growth of Poultry Industry in Saudi Arabia.
- To study the opportunities for Poultry Industry in Saudi Arabia.

3. LITERATURE REVIEW

According to **Bhardwaj et al. (1995)¹**, in a study on cost behavior and marketing margins of broilers, observed that cost of raising broilers varied according to the size of the poultry farms. In marketing broilers, the retailers earned maximum profits, whereas the producers' profit was only half of that of retailer.

Bhardwaj et al. (1996)², in a study of broiler in Haryana, concluded that the supply of broilers was affected by bird mortality and culling rate, which depended on bird age and size of poultry farms. The depletion rate decreased as the size of poultry farm increased. The study further showed that the marketing practices were influenced by the size of farms and seasons.

M.S. Ali and M.M. Hossain (2010)³ conducted study to determine broiler production performance, the relationship between management practices and broiler performance and the problems faced by farmers

involved with broiler production. The factors that had significant negative relationship with productive performance were education, land possession, annual family income, training exposure, broiler farming experience, broiler farm size, capital in broiler farming and extension contact for farmers. All had a significant bearing on performance, while credit needs, problem faced in broiler farming and feed conversion ratio.

Akanni (2007)⁴ opined that despite the poultry production importance it was characterized by low production level. This was due to limited finance for the procurement of basic poultry equipment and materials. The consequence of this was that many of the small-scale poultry farmers are not encouraged to increase their productivity. Moving from small-scale production to a large scale production by small-scale poultry farmers encountered hindrances in the poultry industry which could be detrimental to increase poultry production.

Gnanakumar P Baba (2007)⁵ studied about the financial feasibility of investment in country poultry farming in Tamil Nadu. The study was conducted by selecting data from nearly 50 integrated poultry randomly in Coimbatore district. The farmers were compelled to enter a contract because of the poor income and high market risk from tradition farming, water scarcity, labour crucial point and urge for stronger working capital.

Kanchan and Yeshodha Devi (2006)⁶ researched about the chicken consumption patterns and consumer's preference for processed chickens. The conducted their study in the Coimbatore district. They analyzed the problems of the live bird market as compared to the frozen products in the poultry. The cost and the other seasonal promises of the poultry farmers in that particular region can be reduced by supplementing the processed poultry products along with the live-bird market.

Begum (2005b)⁷ studied about the broiler profitability in relation with the different components of fixed and variable costs. The major expenditures under costs variable were, day-old chicks, feeds and vaccines-medicine. The major costs of the total cost were the variable costs. The total value of fixed cost per bird was less with respect to variable costs. Major part of total cash returns for the independent grower was obtained from the sale of broilers. Independent farmers could rear less number of birds per year when compared with the utilization of rearing capacity for batch for the birds.

4. POULTRY INDUSTRY IN SAUDI ARABIA

The domestic broiler meat production of Saudi Arabia has reached 670,000 MT in 2016. It is four percent higher than the previous year. Broiler production of Saudi is estimated to hereafter increase to 700,000 MT in 2017. This growth in local production is because of current modification in broiler meat the production operation by the 3 most important producers of Saudi poultry.

Local Poultry structure of Saudi Arabia

- There are 450 specialized farms in the kingdom.
- Around 300 farms produce Broiler chicken.
- Almost 100 specialize in Egg production.
- 10 – 12 significant produce value added processors.
- Around 27% of the country's Broiler production is in Qassim area.
- The Makkah region is the second largest producer.
- Riyadh is the third major center of production.
- The two largest poultry farms: Alwatania & Fakieh, together account for some 50% of total domestic poultry production, each with 100,000 metric Tons of production annually.
- Approximately 10 other poultry farms are classified as medium size producers with up to 17,000 metric Tons of production annually.

Following is the table showing the period during the year 2010 to 2017 Saudi Arabia's broiler meat production is

Table-Global Trade Atlas

Year	Production in MT
2010	425,499
2011	509,397
2012	566,495
2013	583,394

2014*	618,398
2015	648,000
2016*	670,000
2017*	700,000

Source: MEWA and * OAA/Riyadh projection

5. GROWTH OF POULTRY INDUSTRY IN SAUDI ARABIA

The rise in crude oil prices has led to the increased economic growth in the region. The rising affluence has led to a shift in consumption pattern from a carbohydrate-based diet to protein-based diet, thus increasing the demand for meat and meat products. Growing population is another factor responsible for increased consumption. Urbanization and growing popularity of retail format, together, are enhancing the consumption of processed food, milk, and meat. The government offers support in the form of direct subsidies for select food production equipment, duty-free imports of raw supplies, interest-free loans and highly subsidized benefits.

The Saudi government is focusing on poultry industry to meet the Kingdom's food security goals. The government is providing support to local poultry producers. It has helped with different types of production support like subsidies for animal feed, ease in the purchase of the purchase of poultry equipment by minimizing the interest rates. The Saudi Agricultural Development Fund (ADF) adopted a strategy to subsidize insurance for poultry production to allow new investments in this sector. It has also compensated farmers for losses related to finance. The major financial losses are due to outbreak of poultry diseases. Therefore, the government is providing a lot opportunities in the country for trade, food processing and infrastructure requirements.

The country's largest poultry producers are expanding operations.

Al-Watania Poultry Farm, the largest broiler farm in the Kingdom with 820,000 broiler production a day, is constructing a new mega poultry farm in Bisaita in Al-Jouf Province. The Bisaita's project, which is expected to be operational by 2020, will increase the company's total daily broiler meat production to one million broilers and its table eggs output to 3 million a day, respectively. Al-Watania currently produces about 1.5 million table eggs a day.

Fakieh Poultry, the second biggest operator, expects its new farm to be operational by 2022. It is targeting a 300,000 daily increase in production from its current estimated 550,000 chickens.

The Saudi poultry meat market is cyclical. Demand rises dramatically in the winter, during the holy month of Ramadan and Hajj season (prior to Eid-al-Adha) - particularly in the cities of Makkah and Medina - when more than eight million visitors come to Saudi Arabia to perform Umrah and Hajj rituals. However, consumption declines in the summer months when millions of Saudis and expatriate workers leave the Kingdom for vacations. In recent years, poultry meat consumption has been steadily rising because of its affordability and the perception that it is healthier than red meat. While most poultry meat consumption is in the form of whole broilers, demand for chicken parts such as leg quarters and breast has been rising. This is due to increased demand by households of working-couples, rising demand for ready-to-cook poultry meals, and continued expansion of the food service sector. In addition, the continuing growth of hypermarkets and supermarkets throughout the Kingdom has helped increase the availability of different poultry varieties and boost the overall demand for poultry meat.

6. OPPORTUNITIES

The Saudi government has been targeting the poultry sector to help achieve the Kingdom's food security strategy goals, by offering local poultry producers with different types of production support that include subsidies for animal feed, interest-free loans and rebates on the purchase of poultry equipment. To reduce the risks associated with high mortality rates and encourage local investors, the Saudi Agricultural Development Fund (ADF) implemented a new cooperative plan to subsidize insurance for poultry production. The stated goals of this national scheme include establishing stricter bio-security programs for participating poultry farms, reducing average chicken mortality rate in the Saudi farms from 25% to 50%, and encouraging new investments in the poultry sector, by compensating farmers for the financial losses they may suffer in case of poultry diseases outbreak. Hence, there are a lot of opportunities in the country regarding trade, food processing and infrastructure requirements. As many importers in this region import live animals, there exist great opportunities for setting up slaughter houses and processing plants in the region.

Government Support

- A 30% cash subsidy on the imports of selected poultry equipment.
- A subsidy of SR 160 per metric ton on imported corn and soyabean meal.

- Protection against imports by way of 20% customs duty or SR. 1 per/kg whichever is higher on import products.

7. CONCLUSION

The existing poultry industry in Saudi Arabia is well placed with poultry companies and government agencies working in tandem to reach new heights. Poultry companies are expanding their facilities and government extending financial and non-financial benefits such as feed subsidies, 30 percent subsidy on imported poultry equipment. 20 percent custom duties on imported poultry products. The domestic production and the imports are at present are neck to neck which is very worrisome from Saudi poultry industry.

Health consciousness has prompted rise of poultry products in contrast to red meat. Domestic meat which is maintained chill is almost 20 percent costlier than frozen imported meat, however the consumers prefer fresh chill domestic meat. The poultry industry like any other faces cyclical demand issues. The growth is very prominent over the years.

Chicken Mortality rate, which extends from 25 percent to as high as 50 percent in some companies is an important issue for poultry industry in Saudi Arabia. Better hygiene, vaccination and proper temperature control are the key elements.

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