
Description: Saudi Arabia is the largest importer of food and agricultural products among the Gulf Cooperation Council (GCC) countries, with a population more than double that of the five GCC states (UAE, Kuwait, Qatar, Oman and Bahrain). Saudi Arabias population was estimated at about 30 million in 2013, and expected to reach 40 million by 2025. This in turn will boost demand for food imports, as Saudi Arabia relies heavily on foreign suppliers to satisfy about 80 percent of its food consumption needs. The rise in crude oil prices has led to increased economic growth in the region. The increased affluence has led to shift in consumption pattern from carbohydrate-based to a 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. Continued economic growth has helped increase Saudi per capita income to $25,000, while changing lifestyle and diets are expected to increase demand for high quality food products.

The Saudi poultry sector has experienced a major production growth in recent years. Broiler meat production is estimated at 640,000 MT in 2014, and expected to further increase 9 percent in 2015. Local broiler production currently covers about 42 percent of total Saudi Arabias consumption needs, estimated at 1.44 million MT. The soaring costs of poultry feed and the high mortality rates in Saudi poultry farms remain the major constraints to expand production.

In 2013, Saudi Arabia was one of the worlds largest importers of broiler meat, with a total of 875,259 MT. Broiler meat imports are forecast to decline by 10 percent in 2014, due to the large production of last year and reduced demand by food catering services, as the number of pilgrims visiting Saudi Arabia for Haj (8 million) is expected to be lower this year. Brazil dominated the Saudi poultry import market in 2013, with 79 percent market share, followed by France with 18 percent, and the U.S. a distant-third with 3 percent.

The Saudi government has been targeting the poultry sector to help achieve the Kingdoms food security strategy goals, through offering local poultry producers with different types of production supports 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 per cent to 5 per cent, and encouraging new investments in the poultry sector by compensating farmers for the financial loses they may suffer in the case of poultry diseases outbreaks. Saudi broiler meat exports to the GCC countries (UAE, Qatar, Bahrain, Oman and Kuwait) have been rising in the last few years. In 2013, Saudi Arabia exported about 35,000 MT of fresh and chilled broiler meat to the GCC countries. Exports are projected to further rise to 50,000 MT in 2014, with increased demand from these countries for the perceived high quality of the Saudi products. Saudi poultry exporters are required to reimburse to the Saudi government for the various production subsidies received by the Saudi producers, estimated at about $533 per MT. Despite the various types of incentives, Saudi poultry production still falls far short from a previously declared governments goal of achieving full self-sufficiency in poultry meat consumption.

Soaring poultry feed costs as well as the high chicken mortality rates in Saudi poultry remain major constraints to expanding broiler production in the Kingdom. Endemic poultry diseases have increased chicken mortality rates in many Saudi poultry farms in recent years, which have been estimated at 25 per cent, on average, and reached 50 per cent in some individual farms. In an effort to halt soaring domestic poultry prices the Saudi Ministry of Commerce and Industry (SMOCI) issued a decree in 2012 banning the export of locally produced broilers.

Saudi Arabia poultry importers and local producers are blaming the price hikes to the rising cost of feed ingredients with some rising as much as 40%. The government has indicated there has been a significant decline in poultry production due to a higher than normal mortality rate and outbreaks of diseases on many farms. The customs duty on imported chicken is 5% ad valorem duty. In order to protect local food processors and production from competitively priced imports, Saudi Arabia ties import duties to the level of local production of similar products. As a general rule, the maximum import tariff rate of 40% is applied
when local production of food or agricultural product exceeds self-sufficiency level.

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