

Poultry Processing Equipment - A Global Market Overview

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Abstracts

The Poultry Processing Equipment market is advancing quickly as producers adopt automation, robotics, AI, and connected sensors to improve every stage of processing. Modern systems handle tasks such as stunning, defeathering, evisceration, chilling, cutting, and packaging with greater precision and consistency, lowering contamination risks and ensuring higher hygiene standards. There is a growing push toward equipment that offers smarter control panels, predictive maintenance, and real-time monitoring to help plant operators optimize throughput and reduce water and energy use. At the same time, the industry is seeing more demand for flexible, small-to-medium capacity machines that cater to organic, free-range, and specialty poultry producers who need adaptable and scalable solutions.

Market growth is supported by strong global appetite for poultry meat, driven by its affordability, high protein content, and widespread acceptance across cultures. Rising disposable incomes and urbanization are increasing consumption of ready-to-cook, ready-to-eat, and value-added poultry products sold through supermarkets, retail chains, and the HoReCa sector. As large poultry integrators expand their production capabilities, they are investing heavily in advanced, automated lines that improve yield and product uniformity. These developments are expected to lift the global Poultry Processing Equipment market from about US\$4.4 billion in 2025 to roughly US\$6.9 billion by 2032, at a CAGR of 6.6% during this period.

Poultry Processing Equipment Regional Market Analysis

North America is set to lead the global Poultry Processing Equipment market in 2025 with an estimated 35.8% share, supported by its highly industrialized and consolidated processing sector, strong demand for protein-rich and processed foods, strict USDA

and CFIA regulations, and early adoption of automation, robotics, and digital monitoring that encourage ongoing equipment upgrades. The region also benefits from robust service networks and easier access to capital, enabling steady investment in high-value, automated systems. In contrast, Asia-Pacific is poised to be the fastest growing market, registering a projected CAGR of 8.3% between 2025 and 2032 as rising urbanization, expanding middle-income populations, and increasing demand for convenient, value-added poultry products drive rapid industrialization of processing facilities. Government-led modernization initiatives, infrastructure improvements, export expansion in countries like China and Thailand, and the transition from small-scale slaughter to organized, automated plants are accelerating equipment adoption, further supported by significant advances in cold chain logistics that enhance efficiency and distribution across the region.

Poultry Processing Equipment Market Analysis by Equipment Type

Killing and Defeathering is expected to lead the global poultry processing equipment market in 2025 with a 37% share, driven by its essential role as the first and mandatory step in automated plants where humane stunning, efficient killing, scalding, and high-throughput feather removal are performed. Its high capital intensity, need for customization, and strict compliance with USDA and EU welfare and hygiene standards keep investment levels high, especially in mature markets focused on minimizing contamination and downtime. In contrast, Deboning and Skinning Equipment is projected to record the fastest growth at a 7.2% CAGR from 2025 to 2032, fueled by surging demand for boneless, skinless, and portion-ready products, rising labor costs, and rapid adoption of advanced automation such as vision-guided robotic deboners and AI-enabled skinning tools. Innovations in precision sensing, integration with high-speed lines, expanding consumption in Asia-Pacific, and sustainability-oriented processing further reinforce its momentum as a key growth driver.

Poultry Processing Equipment Market Analysis by Automation Type

Other than being the largest with an estimated 2025 share of 60.6%, the worldwide market for Fully Automatic Poultry Processing Equipment will also record the fastest 2025-2032 CAGR of 8.6%. This equipment, other than delivering high efficiency, consistency and long-term cost advantages for large-scale plants, also enables a greatly increased throughput, with the capability of processing 6,000 to 15,000 birds per hour, even while ensuring uniform cuts, improved hygiene, and reduced waste through minimal human contact. Integration with advanced technologies such as AI, robotics, machine vision and sensors, Automated Poultry Processing Equipment offers improved

quality control and operational performance, which suits modern facilities. Although they require substantial initial investment, fully automatic systems lower labor and operational costs over time, offering strong ROI for major processors. With rising global poultry demand and widespread adoption, fully automatic lines continue to dominate and expand fastest in the market.

Poultry Processing Equipment Market Analysis by Poultry Type

Globally, Chicken dominates the global poultry market, comprising 85-88% of production and over 90% of consumption. As far as demand for processing equipment goes, an estimated 73.9% of the market for the same is cornered by this variety of poultry, since it has the highest global consumption, the lowest production cost, and the fastest growth cycle, resulting in consistently high processing volumes. Chicken's strong suitability for value-added products, widespread acceptance across cultures, and rapidly rising demand, especially in Asia-Pacific, are driving continuous capacity expansion. At the same time, chicken offers the fastest return on investment for processors, encouraging early adoption of automation and modern hygienic technologies, while tightening food-safety regulations and the shift toward commercial, integrated poultry farming further accelerate equipment upgrades and new installations. The seamless adaptation of chicken to diverse cuisines and value-added formats like nuggets and ready-to-cook items further reinforces its position as a major contributor to demand for processing machinery. A combination of these factors are propelling demand for advanced processing equipment, including automated slaughtering, evisceration, deboning, and packaging systems, which ensure demand for advanced processing equipment, including automated slaughtering, evisceration, deboning, and packaging systems, especially as exports are rising.

Poultry Processing Equipment Market Analysis by Product Type

Estimated to account for a share of 38.8% in 2025, Fresh Processed Poultry Meat leads the global market for Poultry Processing Equipment, owing to its affordability, perceived health benefits, and alignment with high-protein diets. Consumers prefer this form of poultry meat as a lean alternative to red meat, while its lower production costs and shorter rearing cycles make it 20-30% cheaper than beef or pork. Urbanization, rising disposable incomes, and the expansion of quick-service restaurants (QSRs) are further boosting demand, particularly in retail and foodservice channels where freshness and convenience are prioritized. This sustained preference is fueling consistent investment in processing equipment for cutting, deboning, and portioning, further augmenting the market. In contrast, Pre-Cooked Poultry Meat, with a CAGR forecast to be 7.9% over

2025-2032, constitutes the fastest growing product type as made utilizing Poultry Processing Equipment. This surge is being propelled by demand for ultra-convenient, ready-to-eat products among busy urban consumers and dual-income households. QSR chains increasingly adopt pre-cooked items for operational efficiency, while innovations in flavors, organic variants, and e-commerce delivery have expanded accessibility. This trend is driving adoption of advanced cooking, marinating, and packaging equipment, positioning pre-cooked poultry as a key growth engine in the evolving poultry processing industry.

Poultry Processing Equipment Market Report Scope

This global report on Poultry Processing Equipment analyzes the market based on Equipment Type, Automation Type, Poultry Type and Product Type for the period 2022-2032 with forecasts from 2025 to 2032 in terms of value in US\$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics

Historical Period: 2022-2024

Base Year: 2025

Forecast Period: 2025-2032

Units: Value market in US\$

Companies Mentioned: 30+

Poultry Processing Equipment Market by Geographic Region

North America (United States, Canada and Mexico)

Europe (France, Germany, Italy, Russia, Spain, United Kingdom and Rest of Europe)

Asia-Pacific (China, India, Japan, South Korea and Rest of Asia-Pacific)

South America (Argentina, Brazil and Rest of South America)

Middle East & Africa (Saudi Arabia, South Africa, Turkiye, UAE and Rest of Middle East & Africa)

Poultry Processing Equipment Market by Equipment Type

Killing & Defeathering Equipment

Deboning & Skinning Equipment

Evisceration Equipment

Cut-Up Machines

Marinating & Tumbling Equipment

Poultry Processing Equipment Market by Automation Type

Manual

Semi-Automatic

Fully Automatic

Poultry Processing Equipment Market by Bird Type

Chicken

Duck

Turkey

Poultry Processing Equipment Market by Product Type

Cured Poultry Meat

Dried Poultry Meat

Fresh Processed Poultry Meat

Pre-Cooked Poultry Meat

Raw Cooked Poultry Meat

Raw Fermented Poultry Meat

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 - Turkey
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 - Dried Poultry Meat
 - Fresh Processed Poultry Meat
 - Pre-Cooked Poultry Meat
 - Raw Cooked Poultry Meat
 - Raw Fermented Poultry Meat

2. KEY MARKET TRENDS

3. KEY MARKET PLAYERS

- Alfa Laval AB
- Baader Group
- Bayle SA
- Bettcher Industries, Inc
- BFE Services Pty Ltd

Brower Equipment
Cantrell Gainco Group
Cargill, Inc.
Cattaruzzi Srl
CG Manufacturing & Distributing, Inc.
CTB, Inc
Drobtech
Euragglo S.R.L.
Featherman Equipment
Foodmate BV
GEA Group AG
Heat and Control, Inc.
John Bean Technologies (JBT) Corp
Key Technology, Inc.
Kuhl Corp
Linco Food Systems A/S
Marel hf.
Mayekawa Mfg Co Ltd
Meyn Food Processing Technology BV
Nichimo Co Ltd
Prime Equipment Group, Inc.
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Manual

Semi-Automatic

Fully Automatic

Global Poultry Processing Equipment Market Overview by Bird Type

Poultry Processing Equipment Bird Type Market Overview by Global Region

Chicken

Duck

Turkey

Global Poultry Processing Equipment Market Overview by Product Type

Poultry Processing Equipment Product Type Market Overview by Global Region

Cured Poultry Meat

Dried Poultry Meat

Fresh Processed Poultry Meat

Pre-Cooked Poultry Meat

Raw Cooked Poultry Meat

Raw Fermented Poultry Meat

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REGIONAL MARKET OVERVIEW

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United States Poultry Processing Equipment Market Overview by Product Type

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