

# **Poultry Processing Equipment Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Equipment Type (Killing & Defeathering, Evisceration, Cut Up, Deboning & Skinning, Marinating & Tumbling and Others), By Poultry Type (Chicken Meat, Turkey Meat, Duck Meat and Others), By Product Type (Fresh Processed, Raw Cooked, Pre-Cooked, Raw Fermented Sausages, Cured, Dried and Others), By Region and Competition**

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## **Abstracts**

Global Poultry Processing Equipment Market has valued at USD 3.98 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 4.52% through 2028. Poultry processing equipment, an essential component in the poultry industry, encompasses a range of machines meticulously designed to facilitate the transformation of live poultry into delectable, consumer-ready meat products. With their pivotal role in the poultry processing chain, these specialized machines are employed across multiple stages, including slaughtering, defeathering, eviscerating, washing, chilling, and packaging. By streamlining operations and enhancing productivity, poultry processing equipment not only improves efficiency but also upholds stringent hygiene standards, ultimately ensuring the production of safe, high-quality poultry products that meet the demands of discerning consumers.

### **Key Market Drivers**

## Expanding Poultry Industry

The global expansion of the poultry industry is projected to trigger a substantial increase in the demand for poultry processing equipment. As poultry consumption continues to grow worldwide due to factors such as increasing population, urbanisation, and a shift towards protein-rich diets, the necessity for efficient and hygienic poultry processing becomes critical. Poultry processing equipment, which includes killing, defeathering, eviscerating, cooling, and packaging machines, plays a pivotal role in ensuring the quality, safety, and volume of processed poultry products. This equipment helps companies to streamline their operations, reduce waste, and meet the rising consumer expectations for hygiene and quality, which are integral factors for maintaining competitiveness in the global market. In developing regions, such as Asia and Africa, the surge in poultry farming driven by the rising local demand and export opportunities will fuel the need for advanced processing machinery. Furthermore, stringent food safety regulations worldwide are propelling poultry businesses to invest in state-of-the-art processing equipment, hence boosting the global market. Therefore, the growth of the poultry industry will unquestionably lead to an increased demand for poultry processing equipment globally.

## Technological Advancements in Processing Equipment

The advent and continuous evolution of technology have had an undeniably profound impact on various sectors, and the poultry processing industry is no exception. Technological advancements in processing equipment are poised to significantly escalate the global demand for poultry processing equipment. The integration of cutting-edge technology, such as automation and robotics, has honed the efficiency and productivity of poultry processing. Automation simplifies repetitive tasks, minimizes human error, and accelerates production lines, thus fostering higher outputs and profits. Similarly, robotics is being employed for tasks such as deboning and cutting, ensuring precision and reducing wastage.

Furthermore, the incorporation of Artificial Intelligence (AI) and Machine Learning (ML) in processing equipment offers predictive maintenance and optimizes energy consumption. These technologies can predict when a machine is likely to break down, enabling preventive maintenance and reducing downtime. As sustainability becomes a focal point in every industry, energy-efficient processing equipment is likely to drive the market demand. Additionally, digital technologies enhance traceability and transparency, which are becoming increasingly crucial in the food industry. Consumers are more discerning than ever about where their food comes from and how it's

processed. Digital traceability systems offer unparalleled visibility into the supply chain, which can bolster consumer trust and demand.

### Shift Towards Automated Processing

The global shift towards automated processing is set to significantly increase the demand for poultry processing equipment. As the world leans into the digital age, there is a growing emphasis on efficiency, precision, and consistency, which are attributes inherent in automated processes. In the poultry business, this translates into an increased need for technologically advanced processing equipment. Such equipment not only allows for higher throughput but also ensures that the end product meets consistent quality standards. Furthermore, automation reduces the reliance on manual labor, thereby curtailing labor costs and diminishing the impact of labor shortages. This shift is particularly noticeable in developing countries where the poultry industry is rapidly expanding, and automation offers a viable solution to meet the escalating demand. Moreover, the implementation of strict food safety regulations worldwide is pressuring poultry businesses to adopt automated processing methods, further driving the demand for advanced equipment. Lastly, consumer preferences are evolving, with a tendency towards cleanly and ethically processed poultry products. Automated processing equipment can provide the transparency and traceability that modern consumers seek, further stimulating its global demand.

### Expansion of Food Retail Chains

The global expansion of food retail chains is poised to spur a substantial increase in the demand for poultry processing equipment. As these chains proliferate, particularly in emerging markets, the need to process larger volumes of poultry to meet consumer demand is intensifying. This demand growth is not just about quantity but also about quality. Modern consumers are more discerning, often preferring poultry products that have been processed under sanitary conditions, which necessitates the use of advanced processing equipment. Moreover, food retail chains are under constant pressure to ensure their supply chains are efficient and sustainable. High-quality poultry processing equipment can enhance operational efficiency by accelerating processing times and reducing waste. Furthermore, such equipment can enable retailers to comply with increasingly stringent food safety regulations. It's also worth noting that the expansion of food retail chains is often accompanied by an increase in the production of ready-to-eat and convenience poultry products. The production of these items demands specialized poultry processing equipment, thereby driving demand further. Therefore, as food retail chains continue to grow globally, the demand for poultry processing

equipment is expected to soar.

## Key Market Challenges

### High Initial Investment

The poultry processing equipment market is experiencing a shift due to the element of high initial investment. In essence, the high cost of investment in sophisticated machinery is a significant deterrent for many potential participants in the market, particularly in less developed economies. As the prices of advanced poultry processing equipment continue to rise, it becomes increasingly unattainable for many businesses to secure these resources, leading to a decrease in global demand. This elevated upfront cost also discourages small and medium-sized enterprises from entering the market or expanding their operations, thus limiting the overall growth of the industry. Moreover, the maintenance and operational costs associated with these high-end machines can further strain financial resources, making it less appealing for businesses to invest. These factors combined create a substantial barrier to entry and contribute to the decline in global demand for poultry processing equipment. It is crucial for manufacturers to address these cost-related challenges and implement strategies to make their products more affordable to a wider range of customers to ensure sustainable growth in the market.

### Food Safety and Regulatory Compliance

Food safety and regulatory compliance are becoming increasingly stringent globally, impacting the demand for poultry processing equipment. In an effort to enforce rigorous food safety standards, many countries are adopting advanced technologies for poultry processing, reducing the need for traditional equipment. These technologies facilitate compliance with safety norms while enhancing efficiency, thereby decreasing the demand for conventional poultry processing equipment.

Furthermore, regulatory authorities are promoting the use of sustainable and energy-efficient equipment to decrease the environmental footprint of poultry processing. This trend is leading companies to invest in innovative technologies that comply with environmental regulations, further reducing the need for traditional equipment. Incidences of poultry-related diseases can significantly impact consumer trust and demand for poultry products. Strong regulatory compliance ensures a safer food supply chain, instilling confidence in consumers and maintaining steady demand. However, this can simultaneously lead to a decrease in demand for older, less efficient poultry

processing equipment as the industry shifts towards safer, more reliable, and compliant technologies. Thus, while ensuring food safety and regulatory compliance is vital for the industry's growth, it is influencing a global decrease in demand for traditional poultry processing equipment.

## Key Market Trends

### Growing Awareness About Product Quality Among Consumers

The global demand for poultry processing equipment is expected to rise significantly due to the increasing consumer awareness about product quality. Consumers worldwide are becoming more knowledgeable about the food they consume, demanding transparency about its origin, how it is processed, and its impact on health. This has spurred poultry processors to strive for higher quality standards, driving the need for advanced equipment. Poultry processing equipment such as killing & defeathering, evisceration, cut-ups, deboning & skinning, and marinating & tumbling are becoming increasingly vital to ensure the poultry is safe, hygienic, and of top-notch quality. The trend towards a protein-rich diet, coupled with the growth of the fast-food industry, has also given an impetus to the poultry processing industry globally. These factors, coupled with stringent food safety regulations imposed by governments worldwide, are pushing poultry processors to invest in state-of-the-art equipment. Thus, the combination of consumer awareness and industry trends is significantly driving the global demand for poultry processing equipment.

### Strict Food Processing & Safety Regulations

Strict food processing and safety regulations are playing a pivotal role in increasing the global demand for poultry processing equipment. These stringent guidelines necessitate poultry businesses to adhere to high standards of hygiene and safety during the processing of poultry products. Non-compliance can lead to heavy fines, tarnished reputation, and in worst cases, closure of business operations. Poultry processing equipment helps businesses to comply with these regulations by automating the process, which significantly reduces the risk of contamination that manual handling might introduce. Further, these machines are designed to maintain a consistent quality of output, meeting the regulatory standards for product uniformity. By eliminating human errors, the equipment ensures a safer and hygienic end product, thereby boosting consumer confidence and driving sales. Additionally, the global rise in the consumption of processed food, particularly poultry, has led to an increased need for faster and more efficient production. Poultry processing equipment caters to this need, thereby fueling its

demand. Therefore, as governments across the globe continue to tighten food safety norms, the demand for poultry processing equipment is set to rise, propelling the industry's growth worldwide.

## Segmental Insights

### Equipment Type Insights

Based on the Equipment Type, **Evisceration** is currently dominating the Global Poultry Processing Equipment Market. This highly efficient technique, integral to poultry processing, ensures the meticulous removal of internal organs, including the heart, liver, and intestines. This meticulous process not only guarantees a safe and hygienic final product but also results in a visually appealing poultry product for the consumer.

As food safety regulations become increasingly stringent worldwide, the demand for high-quality and efficient evisceration equipment continues to significantly drive the market growth. Poultry processors are seeking advanced technologies and innovative solutions that optimize the evisceration process, reducing manual labor and increasing overall productivity. This growing demand for cutting-edge evisceration equipment is spurring advancements in the market, leading to the development of state-of-the-art machinery that enhances the efficiency and precision of the process. With the global poultry industry experiencing steady growth, driven by rising consumer demand for protein-rich foods, the importance of efficient evisceration equipment cannot be overstated. As the market expands, manufacturers are focusing on producing equipment that not only meets the strictest food safety standards but also enhances productivity and reduces operational costs. The continuous evolution and innovation in evisceration technology are poised to shape the future of the Global Poultry Processing Equipment Market, ensuring the delivery of safe, high-quality poultry products to consumers worldwide.

### Poultry Type Insights

Based on the Poultry Type, the global poultry processing equipment market is primarily dominated by chicken meat, which holds a significant lead due to its high demand and consumption rates worldwide. The need for efficient processing equipment arises from the necessity to meet the demands of the ever-growing chicken meat market. Chicken meat's popularity can be attributed to its various desirable qualities, including its relative affordability, high nutritional value, and remarkable versatility in a wide range of culinary applications. From fast food establishments to gourmet preparations, chicken meat

continues to be a favorite choice for consumers seeking delicious and satisfying meals. Its adaptability to different cooking styles and flavors further contributes to its widespread popularity, making it a staple ingredient in numerous cuisines across the globe.

## Regional Insights

The North American region stands at the forefront of the Global Poultry Processing Equipment Market, owing to various factors. There has been a substantial surge in the consumption of poultry products, fueled by the ever-increasing demand for high-quality protein sources that cater to the health-conscious population. Moreover, the advancements in technology have paved the way for the development of more sophisticated and automated poultry processing equipment, thereby facilitating higher productivity and enhanced quality control measures. Furthermore, the strict and stringent food safety regulations implemented in North America have played a pivotal role in ensuring utmost safety and superior quality of poultry products, thereby reinforcing the region's dominant position in the market. It is this combination of factors that has solidified North America's stronghold in the global poultry processing equipment market, making it a force to be reckoned with.

## Key Market Players

Marel HF

Key Technology, Inc.

John Bean Technologies Corporation

CTB, Inc.

Baader Food Processing Machinery, Inc.

Brower Equipment

Bayle S.A.

Prime Equipment Group, Inc.

CG Manufacturing and Distribution Limited

Prime Equipment Group Inc.

Report Scope:

In this report, the Global Poultry Processing Equipment Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Poultry Processing Equipment Market, By Equipment Type:

Killing & Defeathering

Evisceration

Cut Up

Deboning & Skinning

Marinating & Tumbling

Others

Poultry Processing Equipment Market, By Poultry Type:

Chicken Meat

Turkey Meat

Duck Meat

Others

Poultry Processing Equipment Market, By Product Type:

Fresh Processed

Raw Cooked



Pre-Cooked

Raw Fermented Sausage

Cured

Dried

Others

Poultry Processing Equipment Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Poultry Processing Equipment Market.

## Available Customizations:

Global Poultry Processing Equipment market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

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