



PoultryTechBangladesh

State of Poultry Sector in Bangladesh

Challenges and Road to Sustainable Growth



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Executive Summary

Despite challenges such as the COVID-19 pandemic, the sector has experienced robust growth over the past decade. Constituting approximately ~1.6% of Bangladesh's GDP, the poultry industry plays a crucial role in enhancing food security and providing employment opportunities. Projections indicate that the demand for poultry products will double by 2050. However, the sector faces several significant challenges that hinder its full potential. These include heavy reliance on imported feed materials, tax regulations, supply-demand imbalances, relatively high production costs, regulatory inefficiencies, biosecurity risks, and inadequate infrastructure particularly in cold chain systems.

To accommodate future demand, ensure long-term sustainable profitability, and maintain food security, strategic collaboration between government, industry and institutional stakeholders is essential. Larive International, LightCastle Partners, and the Embassy of the Kingdom of the Netherlands in Bangladesh brought together industry leaders and policymakers during a RoundTable session on 18 November 2024 to discuss current challenges and jointly define a roadmap for the sustainable growth of Bangladesh's poultry sector. This policy paper presents targeted recommendations for both policymakers and industry players to create an enabling ecosystem for sustainable growth and address the sector's existing challenges.

For policymakers, it is essential to implement tax reforms that will reduce operational costs and streamline customs procedures to eliminate delays and inefficiencies. Further, attracting investments is crucial for developing critical infrastructure such as feed storage and cold chain systems, which will improve efficiency, reduce import dependency, and mitigate price volatility. Transparency in contract farming agreements is needed to protect smallholder farmers and strengthen the poultry value chain.

For industry players, a focus on data-driven demand forecasting is essential to better align production with market needs, particularly with respect to Day Old Chicks (DOC). Improving biosecurity measures will reduce disease risks and enhance overall farm efficiency. Consumer awareness campaigns promoting processed poultry products can also increase value addition within the sector.

By addressing these recommendations, the Bangladeshi poultry industry can overcome its current challenges, drive sustainable growth, and strengthen its contribution to the national economy, ensuring it meets the growing demand for poultry products in the future.

Introduction

A roundtable discussion session was organized by PoultryTechBangladesh on November 18, 2024. The program was co-implemented by Larive International and LightCastle Partners in collaboration with the Bangladesh Poultry Industries Central Council, the Feed Industry Association Bangladesh, supported by the Embassy of the Kingdom of the Netherlands in Bangladesh. It convened a diverse group of industry leaders, policymakers, and development partners in Dhaka with the shared goal of advancing the sustainable growth of Bangladesh's poultry sector.

The discussion underscored the current challenges within the sector and highlighted the ongoing efforts to address them, with an emphasis on innovation and collaboration as driving forces for sustainable sector development. The main discussion topics included stabilizing supply and demand, enhancing biosecurity measures, and improving food and feed safety. Participants also explored investment opportunities to modernize the sector and build resilience to climate change. A major focus was on transitioning from informal markets to formalized slaughterhouses and supply chains, a shift that would not only ensure better food safety, but also position Bangladesh for stronger export potential, thereby helping to meet both domestic and global protein demands.

In summary, the Bangladesh poultry sector offers vast opportunities for growth but also presents challenges and banking on the outcomes of the Roundtable discussion, this paper has been devised which explores the issues and provides recommendations for a resilient, equitable poultry industry in Bangladesh.



PoultryTechBangladesh

PoultryTechBangladesh is a collaborative initiative designed to enhance the sustainable growth and competitiveness of Bangladesh's poultry sector. Established through a public-private partnership between leading Dutch and Bangladeshi companies, this project aims to strengthen the poultry value chain in the country. The initiative builds on the findings of a comprehensive Poultry Sector Bangladesh study¹, conducted by Larive-LightCastle on behalf of the Dutch government in 2019-2020, which identified key opportunities for poultry value chain development.

With the support of both the Dutch and Bangladeshi governments, the project emphasizes public-private partnerships to drive agro-food value chain development. Its key objectives:

- Enhance Bangladesh's poultry sector to be more competitive, sustainable, and responsible
- Promote entrepreneurship and ethical business practices in the poultry industry
- Stimulate trade, partnerships, and investment between Dutch and Bangladeshi poultry value chains

To achieve its objectives, PoultryTechBangladesh designs its core activities - studies, demonstrations, technical assistance, and capacity building. These initiatives aim to drive innovation, support sustainable growth, and facilitate trade and international collaboration.

Spearheaded by Larive International and LightCastle Partners, the PoultryTechBangladesh initiative includes the following companies and knowledge institutes: Aeres Training Centre, Aftab Bahumukhi Farms, Quick Chicks, Hato, Hendrix Genetics, Kazi Farms, Marel Poultry, Mavitec, Nourish Poultry, Nutreco, Paragon Poultry, Provita, Royal Pas Reform and Van Aarsen.

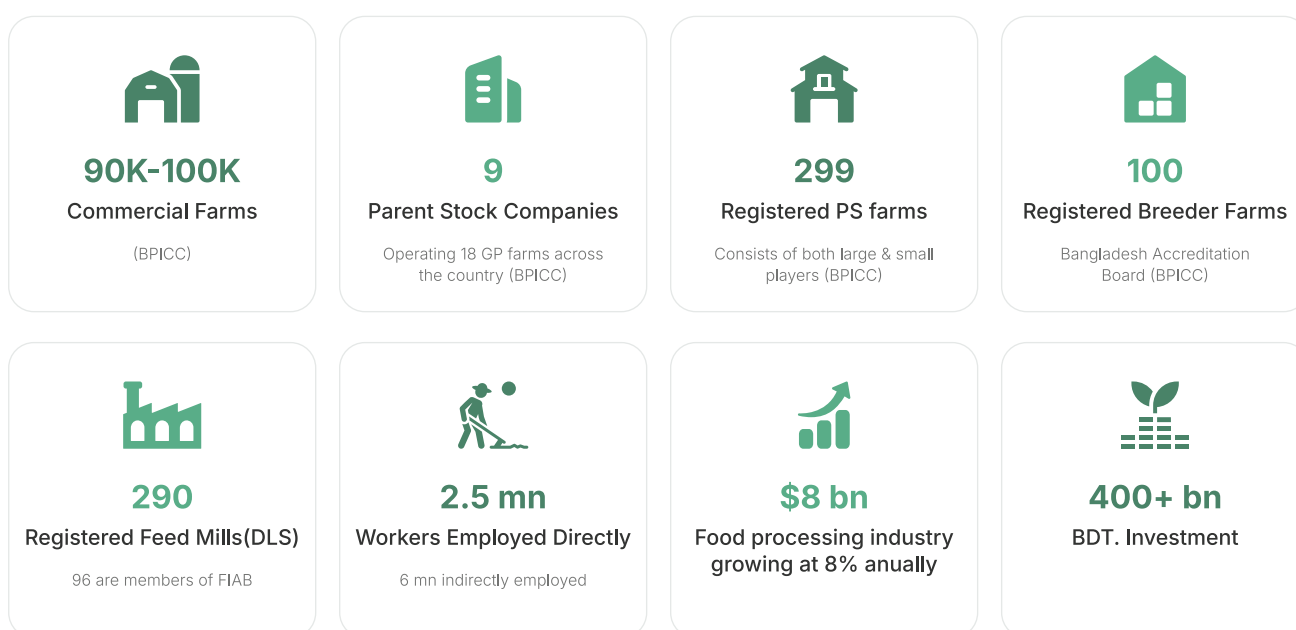
PoultryTechBangladesh is co-funded by the Netherlands Enterprise Agency and the Embassy of the Kingdom of the Netherlands in Bangladesh to facilitate collaborations between Dutch and Bangladeshi companies for the mutual benefit of both countries.

1. [Poultry Sector Bangladesh \(2020\)](#).

Poultry Sector Overview

The poultry sector serves as a key source of protein in Bangladesh, with both broilers (chickens reared for meat) and layers (egg-laying chickens) being widely farmed. Predominantly driven by small-scale farmers, the sector significantly contributes significantly to food security, employment generation, and poverty alleviation.

With a CAGR of approximately 8-10%, the Bangladesh poultry industry has experienced a steady growth. As per the Department of Livestock Services (DLS) reports, the nation currently produces 8.7 million tons of meat each year, with poultry comprising the majority of the total livestock population.



This represents a substantial increase from the 4.5 million metric tons of meat produced during the fiscal year (FY) 2013-2014². With the production of eggs reaching 23.3 billion units in FY 2022-23, the industry is supported by over 300 companies supplying Day-Old Chicks (DOCs) to meet the weekly demand of approximately 1.5 million DOCs.

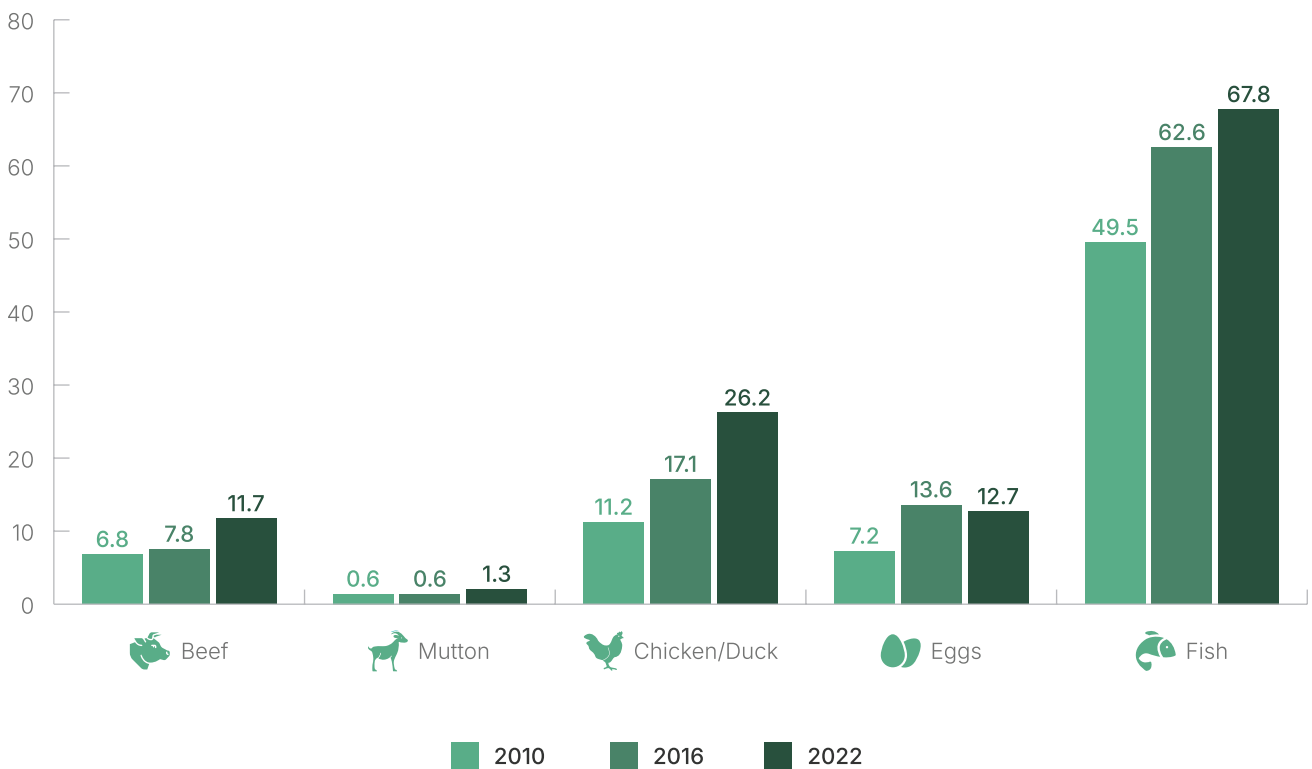
In 2016, the average chicken and duck meat consumption per capita per day was 17.3 grams, while per capita egg consumption was 13.6 grams, respectively. By 2022, these figures rose to 26.2 grams of poultry meat, and 12.7 grams of egg, respectively³. This

2. [Department of Livestock Services \(2022-23\)](#)

3. [Household Income and Expenditure Survey \(2022\)](#)

rise is attributable to factors such as increased poultry and agricultural production, improving wealth levels, and growing awareness about nutrition. While poultry accounts for around 20-25% of protein consumption, demand for poultry products has plateaued, as the per capita consumption of chicken meat in Bangladesh remains only one-third of the intake in developed countries. However, there remain potential opportunities to explore the growth of the sector as the demand is projected to double by 2050.

Trend of Protein consumption (in grams) per capita in Bangladesh



Key Challenges

The poultry sector faces numerous challenges, both external and internal. Externally, factors such as the pandemic, global conflicts, currency fluctuations and climate change have disrupted supply chains and increased costs. Internally, issues like political transitions and the ongoing energy crisis further strain the industry. Currently, the sector is in a transition phase, with rising prices and an excess of middlemen shrinking farmers' margins. Many farmers have closed their businesses, and consumer demand has decreased due to reduced purchasing power, severely impacting the industry's overall performance.



Import Dependency

Import dependency on soy and maize, coupled with exchange rate volatility, drives up feed costs in the poultry sector, ultimately leading to higher consumer prices for poultry products.



Biosecurity & Food Safety Concerns

Human interaction with poultry poses a high risk of contamination, disease outbreaks and health risks necessitating strict biosecurity measures at farms and feed mills.



Process Inefficiencies, Customs & Tax Regulations

Cumbersome feed certification process, high TDS and AIT on gross revenue, coupled with uneven import duties and delayed customs clearance increase cost for poultry businesses, particularly SMEs.



Circularity and Waste Management

Lack of focus on efficient use of poultry waste impacts the sector's sustainability. Rendering plants may be the answer, however, government intervention is needed to support circularity initiatives.



Supply-Demand Imbalance & Price Volatility

Frequent cycles of overproduction and underproduction disrupt supply-demand balance, with a lack of cold storage exacerbating price volatility and product waste.



Lack of Cold Chain Infrastructure

Limited cold storage and stock management facilities, along with absence of a robust cold chain, hinder product shelf life, while consumer preference for fresh products over processed ones adds to the challenges.



Climate Challenges

High temperatures reduce poultry food intake, leading to increased mortality rates. Climate change amplifies these vulnerabilities, posing significant challenges to poultry farming.



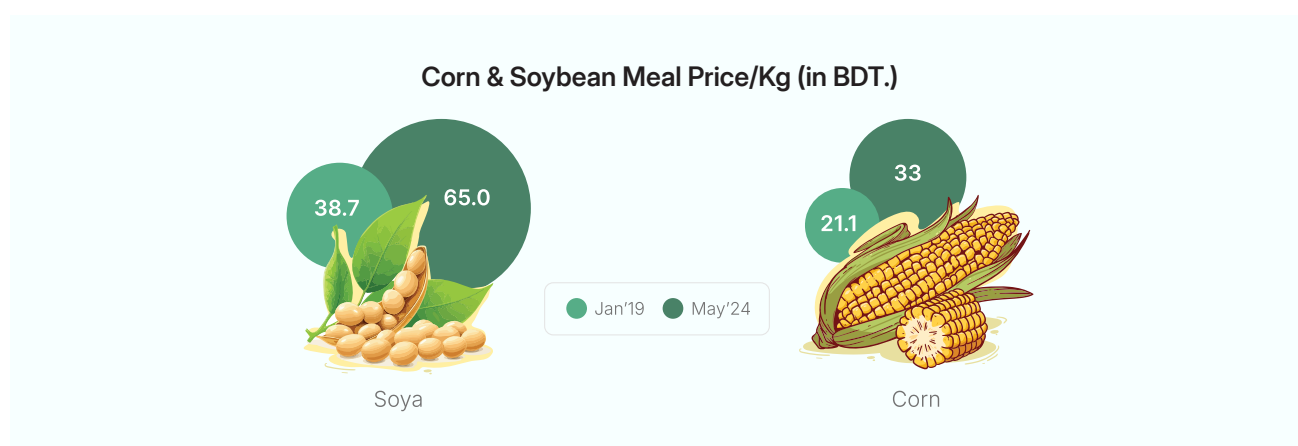
Overproduction and Export Limitations

The absence of export mechanisms for surplus production creates notable hurdles. There is a pressing need for government support in building robust export frameworks to address overproduction issues.

Value chain analysis: Delving deeper into the challenges

■ Import Dependency:

- Import dependency remains a significant challenge for Bangladesh's poultry industry. Key raw materials such as soy and maize are predominantly sourced from abroad. This reliance is exacerbated by a 1% annual decrease in agricultural land, making it harder to cultivate these essential crops domestically. Since feed constitutes 50-60% of total poultry production costs, the relatively high prices of imported raw materials, combined with exchange rate fluctuations, directly elevate feed costs and overall production expenses.
- Prior to the Russia-Ukraine war outbreak in February 2022, Bangladesh was meeting around 15% of its annual demand (2.5-2.6 Million MT) with US soybeans⁴. However, it has increased to 40% of annual demand since the war erupted. For marketing year (MY) 2024/25, corn imports will rise to 1.5 million⁵ MT, due to higher demand in the feed industry. In MY 2023/24 Bangladesh imported just 576,000 MT tons of corn, a notable decline compared to previous years. This drop was attributed to factors such as elevated international prices and difficulties in opening Letters of Credit (LC). However, after the regime change in August 2024 and the relaxation of LC restrictions at certain local banks, the feed industry resumed corn imports as feed demand recovered, indicating the impact of LC restrictions on the effectiveness of the poultry industry.



4. US Soybean Export Council (2023)

5. United States Department of Agriculture

- India permits the use of Meat and Bone Meal (MBM) from slaughterhouse waste, but Bangladeshi feed mills are prohibited due to concerns about potential pig-derived protein. That is, the local poultry sector has found no viable alternative apart from the traditional feed raw materials that have to be sourced from abroad. Consequently, the cost of poultry feed in Bangladesh remains elevated at BDT 60–72 (EUR 0.48 – 0.58) per kilogram, compared to BDT 40–50 (EUR 0.32 – 0.40) per kilogram in India.

■ Process inefficiencies, customs & tax regulations:

- The feed certification process for both domestic selling and exporting reflects a need for simplification, streamlining, and better coordination across relevant regulatory agencies. Specifically, the time and cost implications should be reassessed for better efficiency. Considering the prioritization of domestic feed production, it is essential to minimize barriers to entry for small feed companies.
- There is a provision to collect tax on agricultural products at the supply stage, which increases prices of consumer goods. Suppliers of maize - a key feed ingredient face a 2% TDS (Tax Deducted at Source) on the proceeds from the sale. Furthermore, a 5%⁶ Advance Income Tax (AIT) is imposed on soybean meals and poultry feed additives.
- Although companies can claim AIT rebates during corporate tax filings, this process is often rendered ineffective if the company incurs losses. This situation results in significant amounts of capital being locked up with the National Board of Revenue (NBR). The imposition of TDS and AIT on gross revenue, rather than net profits, disproportionately impacts profitability. Consequently, these taxes can elevate the total tax liability to unsustainable levels, particularly for small and medium-sized poultry businesses, causing considerable financial strain. Furthermore, import duties for feed machinery are set at a relatively low rate of 1%, while spare parts incur a significantly higher tax rate of 35%. On top of that, delayed customs clearance significantly increases the cost of goods sold. Shipments often require 30-40 days to be released from the port, incurring substantial demurrage charges during the process.
- Bangladesh continues to enforce mandatory radiation testing on imported agricultural products, such as raw materials for animal feed, whereas most other

6. [The Business Standard \(2023\)](#)

countries have eased or removed this requirement. Since shipments must wait for clearance, a process that can take up to seven days, port demurrage fees accumulate, ultimately driving up the cost of feed.

■ Supply-demand imbalance & price volatility:

- A key factor contributing to the supply-demand mismatch is the production imbalance of Day-Old Chicks (DOC) by 200+ Parent Stock farms. Excess supply drives prices down sharply, rendering production unprofitable. This forces small-scale hatcheries to exit the market, leading to future supply shortages and price surges, ultimately hindering long-term planning efforts.
- In India, DOCs cost BDT 25-35 (EUR 0.20 – 0.28) each, whereas in Bangladesh, the price is much higher, at BDT 60-100 (EUR 0.48 – 0.81). As of 2024, severe flooding in the Chattogram division has caused a decline in egg production from 4 million per day to 2 million per day. Additionally, the death of 7.5 million chickens has caused an over 8% drop in the daily meat supply, which stands at nearly 5,000 tons. While the broiler chicken supply might recover in 1-1.5 months, layer hens need 5-6 months to start hatching eggs again.
- As of October 2024, Bangladesh's daily egg production is 90% of the required 50 million eggs per day. To mitigate this gap, the government approved the importation of eggs from India. After factoring in customs duties and additional expenses, the total cost of these imported eggs is approximately BDT 8.57 (EUR 0.07) per egg, compared to a local production cost of around BDT 10.45 (EUR 0.08). However, the price reduction has not materialized as expected.

■ Climate Change:

- Extreme heat and load-shedding in Bangladesh have led to slower growth in broilers and reduced egg production impacting the bottom line of the farmers. It also increased mortality rates and feed conversion ratio (FCR), resulting in significant economic losses, with the poultry industry facing around BDT 16,000 crore (EUR 1.29 billion)⁸ in losses during the heatwave in April-May of the year 2024.

7. Dhaka Tribune (October, 2024)

8. The Business Standard (May, 2024)

Additionally, severe flooding in the eastern districts in 2024, caused further losses, while also damaging agriculture and fisheries, significantly worsening the economic impact of climate change on Bangladesh's food production and economy.

■ Biosecurity and food safety challenges:

- In the majority of the poultry farms in Bangladesh, poor biosecurity practices increase the risk of disease outbreaks, such as avian influenza, which can lead to widespread contamination and significant economic losses. Experts opine that the H5N1 outbreak has become enzootic and still occurs in the poultry sector in the country every year. Since 2013, there have been 580 HPAI⁹ reported outbreaks in 54 of the 64 districts in Bangladesh, the vast majority of which are in commercial poultry farms.
- Inadequate sanitation, unsafe handling of poultry products, and the indiscriminate use of antibiotics throughout Bangladesh's supply chain raise concerns about foodborne illnesses, antibiotic resistance, and pesticide residues. These issues, including Salmonella risks and poor hygiene in wet markets, have sparked growing concerns among both the government and citizens.
- Despite policies such as Animal Slaughter and Meat Quality Control 2011¹⁰, the lack of formalized slaughterhouses and strict regulations contributes to inconsistent food safety standards, with informal processing often leading to contamination and compromised product quality. Poultry waste, including offal and leftover parts, is often sold as fish feed or disposed of improperly, with markets lacking sanitation controls, making them breeding grounds for zoonotic pathogens.

■ Circularity and waste management:

- Poultry farms in Bangladesh, particularly small-scale ones, often lack effective waste management, leading to environmental pollution, while large poultry companies practice proper composting and sell litter to crop and fish farmers, however, many small farms dispose of waste haphazardly or reuse it for fertilizer and fish feed. A significant amount of poultry by-products, including feathers, bones, and offal, are discarded without being processed for other uses, missing opportunities for value-added products. Paragon was among the pioneering

9. [Farm biosecurity practices affecting avian influenza virus circulation \(June, 2024\)](#)

10. [The Slaughter of Animal and Quality of Meat Regulation Act \(2011\)](#)

enterprises to establish a biogas plant utilizing 100% poultry waste for gas production. As of 2023, Paragon generated 1 megawatt of electricity through its biogas facility¹¹. Similarly, Kazi Farms has established a rendering plant equipped with technology from Netherlands-based supplier Mavitec. The plant processes poultry hatchery wastes such as shells of hatched eggs, infertile eggs, dead embryos and dead or culled chicks. Since, hatchery waste has a high moisture content of 40-70%¹² making the material prone for rapid spoiling, rendering is the best method for handling and processing hatchery waste for recycling nutrients.

- In Bangladesh, many farms use litter as compost, while others dispose of litter in pits and open areas (44.44%)¹³, leading to environmental pollution and increased disease risks. Improper disposal of poultry waste contributes to water contamination and greenhouse gas emissions, negatively affecting local ecosystems and public health.

■ Lack of cold chain infrastructure:

- The lack of robust cold chain infrastructure holds back the growth of a strong processed poultry sector, limiting a potential way forward to stabilize prices. Inadequate refrigeration causes spoilage, reduced shelf life, and increased foodborne disease risks, especially in remote areas. Currently, Bangladesh faces US\$2.4 billion (EUR 2.34 billion)¹⁴ in annual post-harvest losses in agriculture, with 44% of perishables wasted due to missing cold chain infrastructure. By 2031, temperature-controlled logistic services in Bangladesh, including storage, transportation, and value-added services like grading, labeling, and packaging, are expected to have a combined market value of US\$440 million (EUR 424 million)¹⁵.
- There are significant investment opportunities in developing cold chain facilities, which would improve the handling, storage, and trade of perishable goods in the country. Current regulations restrict private sector involvement and foreign investment in cold chain infrastructure due to lengthy licensing processes, high import tariffs, and policy inconsistencies.

11. [Milestones of Paragon Group \(2023\)](#)

12. [Innovative Waste Solutions: Concept of Rendering Plants in Poultry Industry \(2024\)](#)

13. [Current state of poultry waste management practices in Bangladesh \(2022\)](#)

14. [The Daily Star \(2024\)](#)

15. [Dhaka Tribune \(2024\)](#)

■ Overproduction and export limitations:

- Overproduction in the domestic poultry sector leads to market saturation, driving prices down and reducing profitability for producers. Despite the potential for greater export, the lack of compliance with international standards and logistical constraints restrict Bangladesh's ability to expand its poultry exports.
- The lack of designated disease-free poultry production zones, certified slaughtering areas, and necessary certifications (such as bird flu-free status) hinders export potential by preventing proper hygiene, bio-safety, and compliance with international regulations.



Policy Recommendations:

■ Government Policymakers:

Strategy	Recommendation
Reconsider Taxes in the Supply Chain	Withdrawal of 5% AIT should be considered on poultry feed ingredients while a reduction of 35% tax on spare parts for feed mill machinery should be taken into account to lower operational costs. At present, BPICC is actively engaging with the Tariff Commission to explore the possibility of revising taxes on machinery parts, aiming to ease the burden on the industry and support its growth. Additionally, streamlining customs procedures to reduce delays and demurrage charges should be stressed to further enhance operational efficiency.
Enhance Domestic Raw Material Production for Feed	The government, with support from NGOs and other stakeholders, can distribute high-yielding varieties of maize seeds and inputs among small and marginal farmers, especially in remote areas such as chars. Providing affordable lease facilities or low-interest loans can further help farmers combine harvesters and modern maize shellers, improving efficiency and reducing losses. Such measures will consequently result in reduced import dependency from overseas.
Encourage Fair Contract Farming	In Bangladesh, contract farming is steadily expanding in districts such as Tangail, Pabna, Cumilla, Rangpur, Bogura, and beyond. However, to make it sustainable, it is crucial to ensure fair treatment of farmers by implementing transparent contracts and establishing equitable pricing structures. This will help regulate the involvement of too many middlemen in the value chain and protect the margins of smallholder farmers. In Thailand, CPF (Charoen Pokphand Foods) operates a well-established poultry contract farming model, ensuring stable incomes for farmers while maintaining quality and biosecurity standards. The contractor company manages processing and export, making Thailand a leading poultry exporter.
Balancing the Production of DOCs	To tackle the supply-demand imbalance, the Department of Livestock has developed a strategic paper aimed at regulating Day-Old Chick (DOC) production through data-driven forecasting. This will prevent overproduction, stabilize prices, and ensure a sustainable balance between supply and demand, supporting long-term planning and the

Strategy	Recommendation
	<p>viability of small-scale producers.</p> <p>In this regard, practices from other Asian markets) can be studied. For instance, Indonesia uses tools like supply-demand projections to estimate market needs and regulate production. These projections are developed based on consumption trends, population growth, and seasonal demand variations. The government sets quotas for the production of parent stock, day-old chicks (DOCs), and broilers to control oversupply and stabilize prices.</p>
<p>Facilitating Development of Critical Infrastructure</p>	<p>To address price volatility and reduce systemic risks, the government should invest directly and incentivize public-private partnerships. Additionally, it should promote foreign investment in critical infrastructure, such as storage facilities for surplus poultry and feed. In India, the National Food Security Mission (NFSM) and similar USDA-supported initiatives have led to the development of infrastructure like warehouses and grain depots. For example, warehouses under the Central Warehousing Corporation (CWC) have been built with funding from government and development agencies. The operation and maintenance of these facilities are typically handed over to private sector players under public-private partnership (PPP) models to ensure efficiency and long-term sustainability. Similar investment modalities could be adopted in Bangladesh.</p> <p>Additionally, subsidies and financial support are currently provided to set up modernized cold chains and processing plants in economic and special zones and parks. These improved storage capacities also enable farmers to keep poultry meat for longer periods, resulting in improved bargaining power and a strengthened position of farmers in the poultry value chain. In Vietnam, the Netherlands has been involved in joint ventures within the agricultural sector, particularly with companies like Mavitec, which partnered with local firms to enhance poultry processing and waste management technologies.</p> <p>Given the expertise of Dutch companies in the agriculture domain, partnering with them through joint ventures or public-private partnerships could enable the development of advanced processing plants.</p>

Strategy	Recommendation
Promote Circularity	<p>Sector players should be encouraged to invest in rendering plants to enhance resource efficiency and waste management in the poultry industry. Given the restrictions on importing Meat and Bone Meal (MBM), stakeholders have a significant opportunity to locally produce it from poultry waste for use as aqua feed, thereby supporting a circular economy.</p> <p>To encourage local rendering, the government can introduce incentives for establishing rendering facilities and implement policy changes allowing integrators to utilize by-products as feed inputs. This will reduce import dependency whilst simultaneously addressing environmental concerns by minimizing organic waste disposal issues.</p>
Incentivize Renewable Energy Usage	<p>Poultry farms can generate clean energy through solar panels, reducing electricity costs and benefiting from net metering by selling excess power back to the grid for additional savings. Thailand implemented a Power Purchase Agreement (PPA) with guaranteed prices for solar energy producers, coupled with financial subsidies and tax incentives for solar installations. In Bangladesh, Paragon Poultry Ltd has been running its own biogas plant powered by poultry waste, along with rooftop solar panels, for a considerable period. However, grid infrastructure needs to be developed further for proper implementation of the Net Metering Guideline (NEM) 2018¹⁶. In addition, offering incentives or a tiered pricing structure could make solar investments more viable for the poultry businesses.</p>
Awareness Campaigns	<p>Campaign for Industry Players: The government should launch awareness campaigns for poultry industry players, promoting the judicious use of antibiotics to prevent resistance and ensure long-term sustainability and consumer safety.</p> <p>Campaign directed at consumers: The US Soybean Council's Right to Protein Campaign can be more effective in Bangladesh by tailoring its messaging to address local misconceptions about protein intake. Collaborating with local nutritionists, doctors and community leaders can help raise awareness about the importance of protein-rich foods, particularly those derived from poultry. Additionally, partnering with local ari influencers in the digital space can ensure widespread outreach and education.</p>

16. Net Metering Guideline (2018)

Strategy	Recommendation
Tap into Export Potential	Government stakeholders should strongly monitor biosecurity practices across industry and help establish disease-free poultry zones in the country, and secure necessary international certifications to meet global standards and expand export opportunities. Exploring lucrative opportunities of Halal Meat market, especially in Muslim countries should be part of the long-term strategies for the Bangladeshi poultry sector.

■ Industry players:

Strategy	Recommendation
Accurate Demand Forecasting for DOC	Industry players should invest in research and data analysis to accurately calculate the demand for Day-Old Chicks (DOC), contributing to enhance the estimation capacities of the research initiatives, prevent irregular production and ensure a balanced supply that aligns with market needs.
Adoption of Renewable Energy	Considering the government's Net Metering Guideline 2018, it could be beneficial to explore renewable energy projects, especially solar rooftops, for poultry companies. Additionally, there are a couple of financing options available for eco-friendly products and initiatives. For instance, the Green Transformation Fund (GTF) and the Technology Development/Upgradation Fund from Bangladesh Bank provide industries with the required funding to support the adoption of renewable energy.
Awareness Regarding Protein Consumption	Private sector firms in Bangladesh can create awareness about egg and meat consumption through targeted marketing campaigns, social media engagement, and nutrition-focused advertisements. Engaging with influencers, healthcare professionals, and nutrition experts can effectively highlight the nutritional benefits of poultry products. Additionally, conducting educational programs in schools, and community events can inform consumers about the importance of a balanced diet.

Strategy	Recommendation
Branding and Promotion of Processed Meat	Industry players should focus on branding and marketing processed poultry products to enhance consumer trust and highlight the benefits of safer, high-quality, and hygienic options, helping to stimulate demand.
Strengthen Biosecurity Measures	Industry players should prioritize biosecurity practices across all stages of production to prevent disease outbreaks, ensure healthier poultry and safeguard both consumer health and business profitability. The transition to better controlled slaughtering practices (e.g. professional slaughterhouse capacity) should be on top of the agendas.

Key takeaway

The poultry sector in Bangladesh holds significant potential, with demand expected to double by 2050 due to rising population and income levels. However, this growth is constrained by a range of multifaceted and interrelated challenges, both internal and external, including overproduction, regulatory gaps, biosecurity risks, and the inability to meet international standards for exports. To harness the sector's potential, proper policy formulation is essential to address these challenges, including the regulation of production, improvement of export standards, and strengthening infrastructure. Equally important is ensuring the effective implementation of these policies and recommendations to foster sustainable growth, improve profitability for producers, and secure food supply for the growing population.

The Netherlands is internationally renowned for responsible production of poultry products, innovation and creating added value. Policies & processes applied in the Netherlands regarding food quality, product safety and hygiene are considered as the highest international standards. The Dutch poultry sector (knowledge institutes, government agencies and private sector) could therefore add significant value in developing a more

competitive and responsible poultry sector in Bangladesh. Furthermore, Bangladesh's poultry sector offers substantial business opportunities for Dutch companies.

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