اتحاد الغرف التجارية
الصناعية الزراعية الفلسطينية

Federation of Palestinian Chambers
of Commercem, industry and agriculture

Reviving Gaza's Poultry Sector
From Self-Sufficiency to System Collapse

Key Advocacy Messages

Restoring Gaza's poultry sector is one of the fastest and most cost-effective pathways to improving food security and reducing dependence on humanitarian assistance. Every investment in poultry recovery generates multiple benefits: more food, more jobs, stronger markets, and greater economic resilience. Supporting just 100 operational farms could restore approximately 40% of Gaza's poultry supply within months, demonstrating the sector's exceptional recovery potential. Without immediate action to restore hatcheries, feed supplies, veterinary services, and farm infrastructure, Gaza risks prolonged dependence on imported food and humanitarian aid.

Scan the QR code to access
the interactive Dashboard

15 Jul, 2026

Executive Summary

The poultry sector was one of the most resilient and strategically important productive sectors in the Gaza Strip before the war. Beyond providing affordable animal protein to over two million residents, the sector represented a cornerstone of Gaza's agricultural economy, sustaining 25,000 direct and indirect jobs, supporting hundreds of businesses across the value chain, and achieving full self-sufficiency in broiler meat, table eggs, and turkey production.

Before the war, Gaza's poultry industry produced approximately 24 million broilers annually, 218 million table eggs every year, and between 800,000 and 900,000 turkeys, while local hatcheries supplied 36 million hatching eggs annually. This highly integrated production system enabled Gaza to satisfy domestic demand almost entirely through local production, reducing dependency on imports and strengthening household food security.

The war has resulted in the near-total collapse of this productive system. Approximately 96% of broiler farms, 95% of turkey farms, 66% of feed mills, and 82% of commercial hatcheries have been destroyed or rendered non-operational. Direct financial losses are estimated at USD 233 million, excluding extensive indirect losses resulting from business interruption, unemployment, market disruption, and declining household purchasing power.

Today, commercial poultry production remains almost non-existent. The destruction of production assets, severe shortages of feed, veterinary supplies, hatching eggs, fuel, electricity, and water infrastructure continue to prevent meaningful recovery. Consequently, the availability of one of Gaza's most affordable sources of animal protein has sharply declined, contributing to higher food prices, deteriorating dietary diversity, and increasing food insecurity.

Despite these challenges, opportunities for rapid recovery remain achievable. Existing infrastructure could enable approximately 100 broiler farms to resume production, generating around 900,000 broilers per month, equivalent to approximately 40% of pre-war market demand, provided that essential production inputs become available.

This report demonstrates that restoring the poultry sector is not solely an agricultural priority. It is a strategic investment in food security, economic recovery, employment generation, and private sector resilience. Immediate action from humanitarian and development partners is therefore essential to prevent further deterioration and accelerate recovery.

Note: A significant portion of the information and technical data presented in this report was obtained through close coordination with the Palestinian Poultry, Hatcheries and Feed Association, whose valuable contributions have supported the preparation of this assessment. The Gaza Chamber of Commerce, Industry & Agriculture extends its appreciation to the Association for its cooperation and continued support.

1. Background

The poultry sector has historically represented one of Gaza's most productive agricultural subsectors. Unlike many other food commodities, poultry production offers a relatively short production cycle, allowing rapid restoration of local food supplies once production inputs become available.

The sector encompasses a comprehensive value chain, including hatcheries, breeder farms, broiler farms, layer farms, turkey farms, feed mills, veterinary services, transportation, cold storage, wholesale and retail markets, processing facilities, and input suppliers.

Prior to the war, this integrated system enabled Gaza to achieve near-complete self-sufficiency in poultry meat and eggs while generating thousands of employment opportunities and supporting agricultural income.

The destruction of this system therefore represents not only a production crisis but also a broader economic and humanitarian challenge affecting livelihoods, nutrition, market stability, and the resilience of Gaza's food system.

2. The Poultry Sector Before the War: A Strategic Pillar of Food Security

Before the war, Gaza's poultry sector consistently met virtually all local demand for fresh poultry meat and eggs through domestic production.

Table (1): Key Indicators Before the War

#	Indicator	Value
1	Annual hatchery capacity	36 million hatching eggs
2	Weekly broiler consumption	550,000 birds
3	Monthly broiler consumption	2.2 million birds
4	Annual broiler production	24 million birds
5	Layer hens	1 million birds
6	Daily egg production	640,000 eggs
7	Annual egg production	218 million eggs
8	Average egg consumption	103 eggs/person/year
9	Turkey production	800,000–900,000 birds/year
10	Direct & indirect employment	25,000 jobs
11	Livestock contribution to agricultural income	50%

Key Findings

- 100% local self-sufficiency in fresh broiler meat.
- 100% self-sufficiency in table eggs.
- Annual production exceeded 24 million broilers.
- The sector sustained 25,000 livelihoods.
- Livestock accounted for half of Gaza's agricultural income.

24 Million	218 Million	25,000	100%	36 Million
Broilers / Year	Eggs / Year	Jobs	Local Supply	Hatching Eggs

3. Impact of the War: From a Self-Sufficient Industry to Near Total Collapse

The war has caused an unprecedented collapse of Gaza's poultry sector, disrupting every stage of the production value chain—from hatcheries and feed manufacturing to poultry farms, veterinary services, transportation, and marketing systems. What was once a largely self-sufficient sector has become almost entirely dependent on humanitarian support and sporadic market supplies.

The destruction extends beyond physical infrastructure. The loss of productive assets, combined with severe restrictions on the entry of essential production inputs, has halted commercial production and undermined one of Gaza's most important sources of affordable animal protein.

The sector's collapse has had cascading effects on food security, employment, household purchasing power, and the resilience of local markets.

3.1 Destruction of Productive Assets

The war resulted in extensive destruction across all major poultry production facilities.

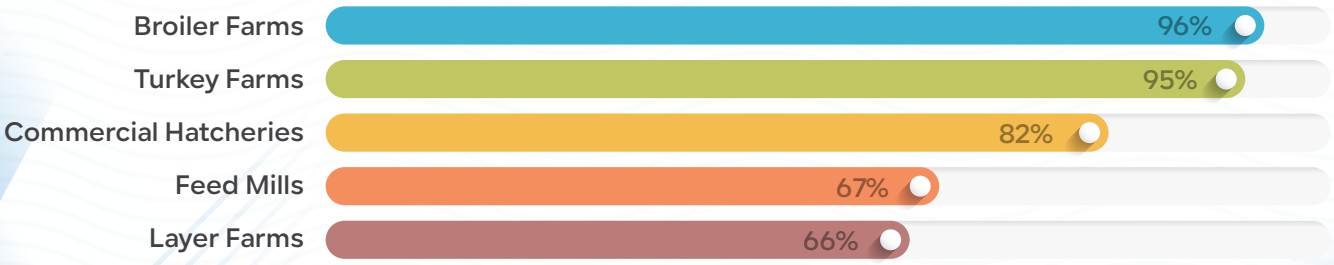
Table (2): Damage Assessment of Poultry Production Facilities

#	Facility	Before the War	Damaged	Potentially Recoverable Facilities	Estimated Damage
1	Broiler Farms	2,500	2,408	100–120 farms	96.30%
2	Layer Farms	420	276	None*	65.70%
3	Turkey Farms	420	399	None*	95.00%
4	Commercial Hatcheries	22	18	4 hatcheries	81.80%
5	Feed Mills	6	4	2 feed mills	66.70%

Note: Although a limited number of layer and turkey farms remain structurally undamaged, they are currently occupied by displaced families and are therefore unavailable for poultry production.

Key Findings

- More than nine out of every ten broiler farms have been destroyed or rendered inoperable.
- Turkey production has almost completely disappeared, with 95% of farms damaged.
- The destruction of commercial hatcheries has severely reduced the local supply of day-old chicks, creating a major bottleneck for sector recovery.
- Damage to feed mills has significantly constrained local feed availability, increasing dependency on imported feed.



3.2 Economic Losses

Direct financial losses across the poultry sector are estimated at approximately USD 233 million, making poultry one of the most severely affected productive sectors in Gaza.

Table (3): Estimated Direct Financial Losses

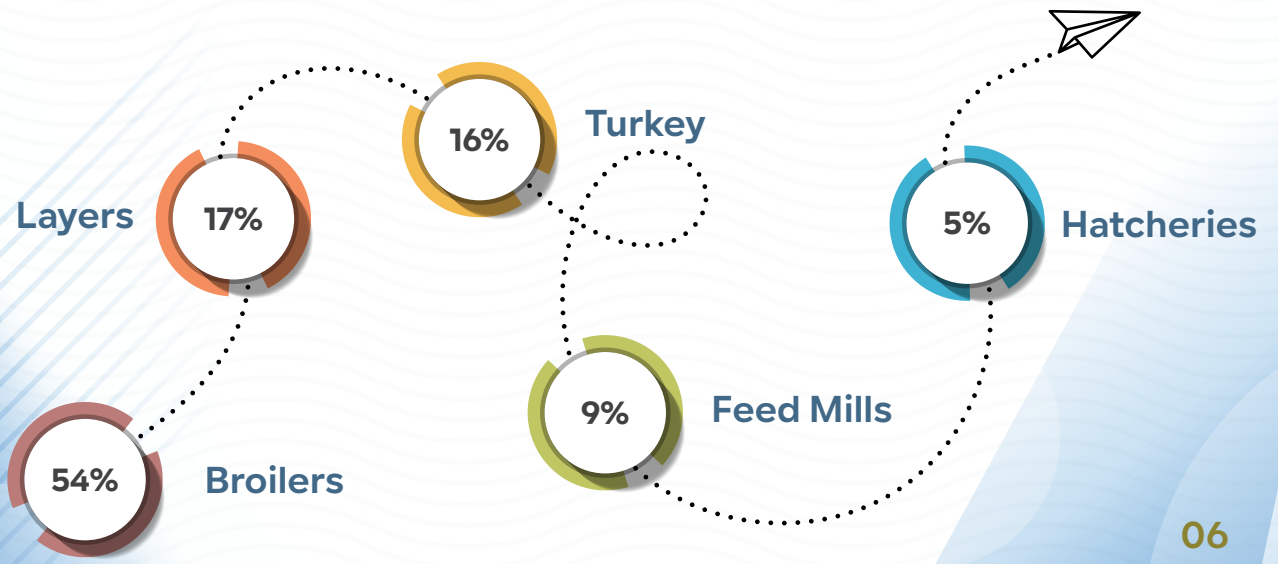
#	Sub-sector	Losses (USD)	Share of Total Losses
1	Broiler production	126 million	54.10%
2	Layer production	39 million	16.70%
3	Turkey production	36 million	15.50%
4	Feed mills	20 million	8.60%
5	Hatcheries	12 million	5.20%
6	**Total**	**233 million**	**100%**

Analysis

More than half of all direct losses (54%) occurred within the broiler industry alone, reflecting the central role that broiler production played in Gaza's food system before the war.

The destruction of hatcheries and feed mills further amplifies these losses because these facilities represent critical upstream components of the production chain. Even where poultry farms remain structurally intact, production cannot resume without access to chicks and feed.

Consequently, rebuilding poultry farms without simultaneously restoring hatcheries and feed production would significantly delay sector recovery.



3.3 Food Security Implications

The collapse of poultry production has substantially reduced the availability of locally produced animal protein in Gaza. Before the war, domestic production supplied approximately 24 million broilers annually and 218 million table eggs, ensuring widespread access to affordable, nutritious food. Today, commercial poultry production is virtually absent. The implications extend well beyond agriculture. The reduction in domestic poultry production has:

- Reduced the availability of affordable animal protein.
- Increased household dependence on humanitarian food assistance.
- Contributed to rising food prices.
- Reduced dietary diversity.
- Increased nutritional risks for children and pregnant women.
- Placed additional pressure on already fragile food markets.

Unlike imported frozen poultry products, locally produced fresh poultry represented one of the most accessible sources of protein for middle- and low-income households. Its disappearance has therefore disproportionately affected vulnerable families.

3.4 Impact on Employment and Livelihoods

Prior to the war, the poultry sector directly and indirectly supported approximately 25,000 jobs, spanning production, hatcheries, feed manufacturing, veterinary services, transport, marketing, processing, equipment maintenance, and retail. The widespread destruction of production facilities has disrupted employment opportunities throughout the entire value chain. The consequences extend beyond farm owners to include:

- poultry workers.
- veterinarians.
- wholesale traders.
- maintenance technicians.
- feed suppliers.
- transport companies.
- retailers.
- equipment suppliers.

As a result, the collapse of poultry production has significantly reduced household incomes while weakening the broader rural economy.

3.5 Market Consequences

The contraction in domestic production has coincided with substantial increases in production costs and consumer prices. Compared with pre-war levels:

Table (4): Poultry Price Increases

#	Commodity	Price Increase
1	Layer feed	150–257%
2	Broiler feed	52–92%
3	Broiler meat	173–233%
4	Eggs	150–264%

These increases are primarily driven by:

- limited availability of feed;
- disrupted supply chains;
- high transportation costs;
- shortages of electricity and fuel;
- restricted imports of production inputs.

Consequently, poultry products have become significantly less affordable, particularly for low-income households already facing declining purchasing power.

Key Message

The destruction of Gaza's poultry sector represents far more than the loss of agricultural infrastructure. It has fundamentally weakened one of the territory's primary food production systems, reduced employment, accelerated food price inflation, and increased dependence on humanitarian assistance. Restoring this sector is therefore essential not only for agricultural recovery but also for strengthening food security, rebuilding livelihoods, and supporting Gaza's broader economic resilience.

4. Recovery Potential: A High-Impact Investment Opportunity

Despite the unprecedented destruction suffered by Gaza's poultry sector, the industry retains significant recovery potential. Unlike many agricultural subsectors that require years to restore productive capacity, poultry production is characterized by short production cycles, relatively rapid capital turnover, and immediate contributions to household food security.

Although commercial production remains largely suspended, existing infrastructure and technical expertise provide a realistic foundation for restarting production within a relatively short timeframe, provided that essential production inputs become available.

This presents an important opportunity for humanitarian and development partners to generate rapid, measurable, and cost-effective impacts on food availability, employment, and local market recovery.

4.1 Existing Production Capacity

Field assessments conducted by the Poultry Farms and Hatcheries Association indicate that approximately **100 broiler farms** (located within secured, populated areas that are entirely outside of Israeli military control) remain structurally capable of resuming operations, subject to rehabilitation and the availability of critical production inputs.

These farms alone could collectively produce approximately **900,000 broilers per month,** representing nearly **40% of Gaza's pre-war monthly market demand.**

Table (5): Current Recovery Capacity

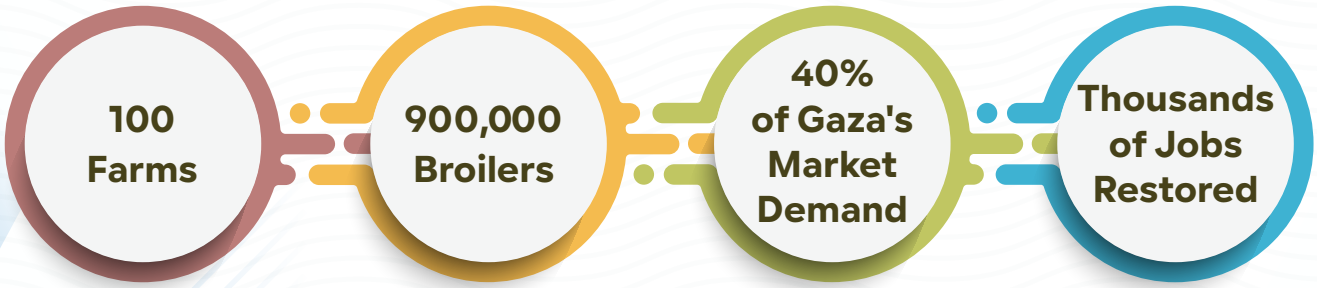
#	Indicator	Current Status
1	Potentially operational broiler farms	100 farms
2	Potential monthly production	900,000 broilers
3	Potential market coverage	40%
4	Commercial hatcheries currently operating	0
5	Small household hatcheries	10 units
6	Current chick production	5,000–7,000 chicks/month

Analysis

The ability to restore 40% of market demand without constructing entirely new infrastructure demonstrates that significant recovery can be achieved through targeted rehabilitation rather than full sector reconstruction.

This represents one of the highest returns on investment among Gaza's productive sectors.

Rather than rebuilding thousands of farms simultaneously, supporting the rehabilitation of the existing operational base could rapidly restore food production while laying the foundation for broader sector recovery.



4.2 Why Poultry Recovery Matters

Restoring poultry production delivers multiple humanitarian and economic benefits simultaneously. Unlike infrastructure-intensive sectors, poultry production begins generating outputs within 6–8 weeks after production inputs become available. Consequently, investments in poultry recovery produce faster results than many other agricultural interventions.

Restoring poultry production would:

- Increase the availability of affordable animal protein.
- Reduce dependence on humanitarian food assistance.
- Create employment across the poultry value chain.
- Support local feed, transport, veterinary and marketing businesses.
- Improve dietary diversity.
- Stabilize food prices.
- Strengthen private-sector recovery.



4.3 Key Recovery Bottlenecks

Although recovery is technically feasible, several critical constraints continue to prevent commercial production. The primary obstacle is not the absence of producers, but rather the lack of essential production inputs.

Table (6): Critical Recovery Constraints

#	Constraint	Current Situation	Impact
1	Feed	Only around 2 trucks/week enter Gaza	Production cannot resume
2	Commercial hatcheries	None currently operating	Severe chick shortages
3	Hatching eggs	Extremely limited access	Limits flock replenishment
4	Veterinary medicines	Severe shortages	Higher disease risk
5	Electricity	Limited availability	Hatcheries cannot operate
6	Fuel	Very expensive	Higher production costs
7	Water infrastructure	Damaged	Limits farm operations

Analysis

These constraints are highly interconnected.
For example:

- Providing feed without restoring hatcheries will not restore production.
- Likewise, rehabilitating farms without ensuring electricity or veterinary services will yield only limited results.
- A coordinated recovery package is therefore essential.

4.4 Feed Supply: The Most Immediate Constraint

Feed remains the single largest constraint affecting poultry recovery. Before the war, Gaza imported approximately 15,000 metric tons of feed every month to support livestock production. Currently, feed enters only in very limited quantities, estimated at approximately two trucks (about 50 tons) per week, primarily through humanitarian channels. This represents only a small fraction of pre-war requirements. Limited feed availability has also driven sharp increases in production costs.

Table (7): Feed Prices

#	Feed Type	Before War	Current	Increase
1	Layer feed	1,400–2,000 ILS	5,000 ILS	150–257%
2	Broiler feed	2,600–3,300 ILS	5,000 ILS	52–92%

Feed now represents the largest single production cost, making commercial poultry production economically unviable for many farmers.

4.5 The Hatchery Crisis

The destruction of Gaza's hatchery sector has created one of the most critical bottlenecks in rebuilding poultry production. Before the war, commercial hatcheries possessed an annual production capacity of approximately 36 million hatching eggs, ensuring a reliable supply of day-old chicks for broiler farms.

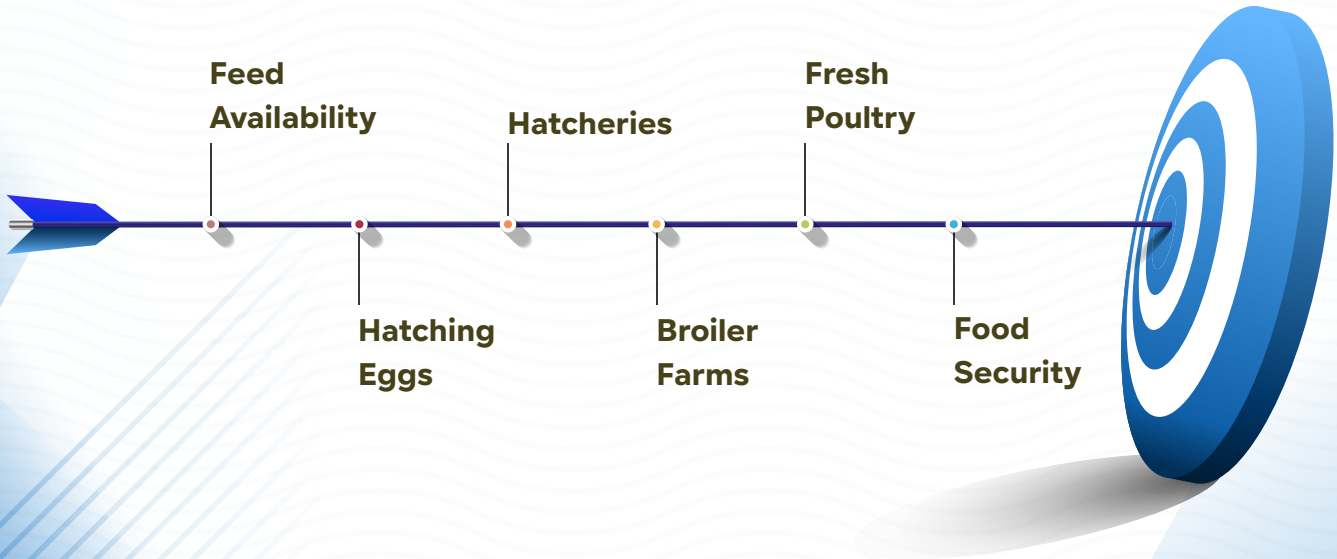
Today:

- No commercial hatchery is operational.
- Only 10 small household hatcheries remain.
- Alternative energy systems cost USD 40,000–45,000 per hatchery, placing them beyond the financial capacity of most operators.
- Due to the complete absence of grid electricity and a nearly sevenfold (7x) increase in fuel prices required to run backup generators, the operational cost for a single hatchery has soared to USD 40,000–45,000 per production cycle, placing this critical step far beyond the financial capacity of most local operators.

Without restoring hatchery capacity, farm rehabilitation alone cannot revive the poultry sector.

Key Message

The poultry sector does not require rebuilding from zero. A significant proportion of production can resume within months through targeted investments in farm rehabilitation, hatcheries, feed supply, veterinary services, and energy solutions. Supporting these priority interventions would rapidly restore local food production, create employment, and reduce dependence on humanitarian assistance.



5. Key Challenges Hindering Sector Recoveryt

The recovery of Gaza's poultry sector extends beyond rebuilding damaged infrastructure. It requires restoring an integrated production system in which every component—from hatcheries and feed supply to veterinary services and market access—functions effectively.

While a substantial portion of production capacity remains technically recoverable, multiple interconnected constraints continue to prevent the sector from resuming commercial operations.

These challenges affect every stage of the poultry value chain and require coordinated interventions from humanitarian agencies, development partners, financial institutions, and relevant authorities.

5.1 Destruction of Production Infrastructure

The extensive destruction of poultry farms, hatcheries, feed mills, warehouses, water systems, roads, and storage facilities remains the principal barrier to sector recovery. With 96.3% of broiler farms and 95% of turkey farms either destroyed or severely damaged, most producers have lost the physical assets necessary to restart production. In many cases, surviving facilities require comprehensive rehabilitation before they can resume operations. Without investments in rebuilding productive infrastructure, the sector cannot recover at the scale required to meet domestic demand.

5.2 Severe Shortages of Feed and Production Inputs

Feed remains the most immediate operational constraint. The current level of feed imports is insufficient to sustain meaningful poultry production, while prices have increased by up to 257% compared with pre-war levels. In addition to feed shortages,

producers continue to face limited access to:

- hatching eggs.
- day-old chicks.
- veterinary medicines.
- vaccines.
- disinfectants.
- poultry equipment.
- spare parts.

These shortages significantly increase production risks and discourage farmers from restarting operations.

5.3 Collapse of the Hatchery System

The destruction of commercial hatcheries has disrupted the entire production cycle. Even where farms remain structurally intact, producers cannot resume operations without reliable access to high-quality chicks. Current production by household hatcheries represents only a small fraction of pre-war requirements and cannot support commercial-scale recovery. Restoring hatchery capacity should therefore be considered a strategic priority.

5.4 Energy Constraints

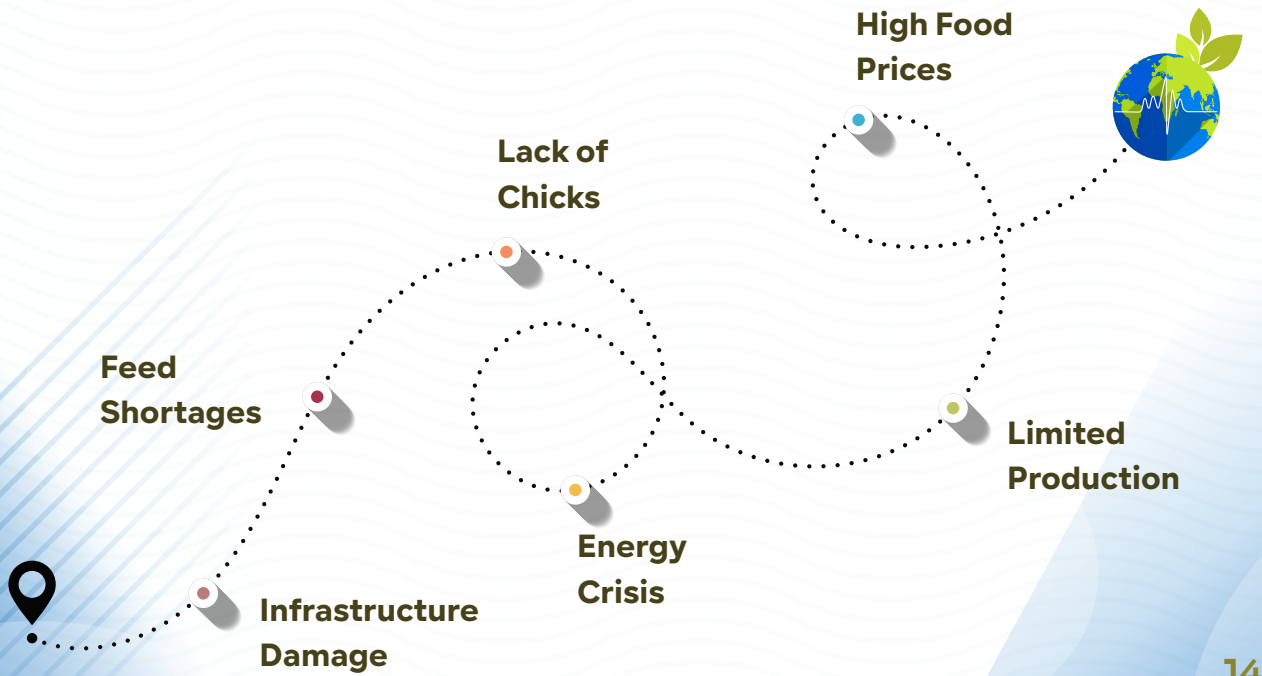
Reliable electricity is essential for hatcheries, poultry houses, feed mills, water pumping systems, cooling equipment, and ventilation. Current electricity shortages, combined with the high cost of fuel, significantly increase production costs and reduce hatchability rates. Alternative energy solutions remain prohibitively expensive for most producers. Without sustainable energy support, the sector will continue to face severe operational limitations.

5.5 Veterinary and Animal Health Risks

The limited availability of veterinary medicines, vaccines, and diagnostic services has increased the risk of disease outbreaks. This not only threatens surviving poultry populations but also discourages producers from investing in new production cycles. Animal health services should therefore be integrated into all recovery programmes.

5.6 Market and Logistics Constraints

Damaged roads, transportation networks, cold storage facilities, and wholesale markets continue to disrupt the movement of production inputs and finished products. These logistical constraints increase production costs, reduce marketing efficiency, and contribute to higher consumer prices.



6. Strategic Recommendations

The recovery of Gaza's poultry sector requires a phased and coordinated response that combines humanitarian assistance with early recovery and long-term development interventions. Priority investments should focus on restoring productive capacity while simultaneously strengthening food security and rebuilding livelihoods.

Recommendation 1: Prioritize Poultry Sector Recovery within Early Recovery Programmes

Recognize poultry production as a strategic food security sector and include it among the priority sectors supported under early recovery and economic resilience programmes.

Recommendation 2: Rehabilitate Poultry Farms

Launch a comprehensive programme to rehabilitate damaged poultry farms, prioritizing the approximately 100 farms capable of resuming production within a short timeframe. Supporting these farms could restore approximately 40% of Gaza's pre-war poultry demand.

Recommendation 3: Restore Commercial Hatcheries

Provide financial and technical assistance to rehabilitate commercial hatcheries, including:

- replacement of damaged equipment.
- installation of renewable energy systems.
- provision of incubators.
- technical support.

Restoring hatcheries is essential for rebuilding the entire poultry value chain.

Recommendation 4: Ensure Predictable Access to Feed

Facilitate the regular entry of:

- poultry feed.
- feed ingredients.
- feed additives.

Reliable feed supplies are the single most important prerequisite for restoring production.

Recommendation 5: Facilitate Entry of Hatching Eggs

Simplify and accelerate procedures for importing:

- hatching eggs.
- breeder stock.
- day-old chicks.

This intervention would significantly reduce recovery time.

Recommendation 6: Support Veterinary Services

Provide:

- vaccines.
- veterinary medicines.
- laboratory supplies.
- diagnostic services.
- mobile veterinary teams.

Protecting animal health is essential to safeguard recovery investments.

Recommendation 7: Expand Renewable Energy Solutions

Support the installation of:

- solar systems.
- battery storage.
- hybrid energy solutions.

Renewable energy would reduce operating costs while ensuring continuous hatchery and farm operations.

Recommendation 8: Strengthen Access to Finance

Establish dedicated financing mechanisms to support poultry producers through:

- grants.
- concessional loans.
- revolving funds.
- guarantee schemes.

Limited access to capital remains one of the principal barriers to recovery.

Recommendation 9: Support Local Value Chains

Recovery programmes should support the entire poultry value chain, including:

- feed production.
- transport.
- veterinary services.
- wholesalers.
- retailers.

Integrated interventions will generate broader economic impacts than farm-level support alone.

Recommendation 10: Strengthen Coordination

Enhance coordination among:

- FAO.
- UNDP.
- WFP.
- international NGOs.
- financial institutions.
- relevant government authorities.
- private sector organizations.

A coordinated approach will maximize the efficiency and sustainability of recovery investments.

7. Conclusion

Before the war, Gaza's poultry sector was a cornerstone of local food production and economic resilience. It achieved full self-sufficiency in fresh poultry meat and table eggs, generated employment for approximately 25,000 people, and supplied millions of households with affordable, high-quality animal protein.

Today, the sector has suffered catastrophic losses, with direct damages estimated at USD 233 million and widespread destruction across farms, hatcheries, feed mills, and supporting infrastructure. Commercial production has nearly ceased, contributing to reduced food availability, rising prices, and declining household purchasing power.

Yet, the sector also represents one of Gaza's most promising opportunities for rapid recovery. Existing technical expertise, surviving infrastructure, and the short production cycle of poultry farming mean that targeted investments can deliver tangible results within months rather than years.

Rehabilitating approximately 100 operational farms, restoring hatchery capacity, ensuring predictable access to feed and veterinary inputs, and investing in renewable energy could quickly revive domestic production, improve food security, and reactivate a vital segment of Gaza's private sector.

Reviving the poultry sector is therefore not merely an agricultural intervention—it is a strategic investment in food security, livelihood restoration, economic recovery, and long-term resilience. Coordinated action by humanitarian agencies, development partners, donors, and relevant authorities is urgently needed to transform this recovery potential into measurable outcomes for the people of Gaza.