



POULTRY MARKET STUDY

TERMS OF REFERENCE

17 June 2026

1. Initiation of the market study

- 1.1. The Executive Director of the Competition Commission (“Executive Director”) has launched a market study into the poultry sector, referred to as the “MS012 - Poultry Market Study” (PMS). The PMS has been initiated pursuant to Section 30(a) and (h) of the Act, which empowers the Executive Director to review conditions of competition in the market and undertake general studies on the effectiveness of competition in individual sectors of the economy in Mauritius.
- 1.2. The poultry industry is an important contributor to the local agricultural sector. For the year 2024, livestock and poultry contributed around Rs 5.6 billion, or 19% of the total agricultural gross value added. More than 90% of this value represents the production of chicken meat and eggs, which is the main source of protein for, and the predominant choice of, Mauritian households. In 2025, the production of chicken meat increased to 57,000 tonnes from 53,900 tonnes in 2024.
- 1.3. The poultry market is characterised by a complex value chain with high levels of concentration and vertical integration. A few large poultry producers are present at the various levels of the supply chain. They are involved in the supply of poultry feed, grandparent and parent stock, day-old broiler and layer chicks, chicken meat and eggs. These large commercial enterprises also operate abattoirs and distribute their products through franchise and other retail outlets to consumers, and through wholesale channels to the restaurant and catering industry.
- 1.4. In Mauritius, most chicken meat and eggs are produced and supplied by a few large, vertically integrated companies. Such a market structure is not uncommon for industries like poultry, as substantial efficiencies can be generated in terms of both economies of scale and scope. It is, however, important to ensure that market conduct across the supply chain is conducive to ensuring a level playing field for all operators, and that consumers are benefiting from competitive outcomes.
- 1.5. In this regard, the Executive Director deems it important to launch the PMS to better understand the conditions of competition across the poultry supply chain. Among other things, the PMS will review the terms of supply for day-old chicks and feed to smaller operators, as well as commercial arrangements regarding contract growing. The study will also analyse the structure, regulatory framework and prices of poultry products, which have registered significant increases over the last few years.
- 1.6. It is to be highlighted that, at this stage, the Executive Director has not determined that any feature of the poultry market is necessarily impeding effective competition. Rather, the study is intended to shed light on competition dynamics in the industry and come up with recommendations to address any competition issues identified and, if warranted, initiate enforcement actions.

2. Scope of the study

- 2.1. The PMS aims to understand the competitive landscape of the local poultry industry in terms of:

- a) assessing the market structure and potential existence of market power along the supply chain;
- b) evaluating the nature of commercial agreements that exist between large integrated farms and independent contract growers with respect to price and supply of key inputs, to establish any anti-competitive impact on their operations;
- c) analysing the underlying causes behind the surge in prices of chicken meat and eggs;
- d) identifying potential barriers to entry and expansion resulting from current market features or the current regulatory framework; and
- e) coming up with recommendations to enhance competition in the poultry industry.

3. Timelines and Process

3.1. The indicative timeline and process of the PMS are outlined in Table 1 below.

Table 1. PMS - Indicative Dates and Process

Indicative dates	Process
17 June 2026	Launching of the study publication Inviting comments on the Terms of Reference of the Study
30 June 2026 – 31 December 2026	Initial engagement and information gathering from stakeholders.
04 January 2027 – 31 March 2027	Competitive assessment and drafting of Preliminary Report.
31 March 2027	Issue Preliminary Report of the Study
01 April 2027 – 30 April 2027	Inviting views and comments from stakeholders on the Preliminary Report
01 May 2027 – 31 May 2027	Assessment of views and submissions from stakeholders and drafting of Final Report.
11 June 2027	Publication of Final Report.

3.2. The public is invited to submit their views and comments on the terms of reference of the PMS by 31 August 2026. Written submissions can be sent to the Executive Director by post or email, with the reference “Comments on Poultry Market Study”, at the addresses provided below.

The Executive Director

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