

GCC Edible Meat Market - Size, Share, Covid-19 Impact & Forecasts Up To 2028

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Report description:

The GCC Edible Meat Market is projected to register a CAGR of 2.01%

Key Highlights

Largest Segment by Type - Poultry : Product consistency, surge in regional production and higher protein/lower fat content are some of the major factors influencing the higher poultry consumption in the region.

Largest Segment by Country - Saudi Arabia : Poultry and beef are Saudi Arabia's choice of meat. The local regulatory bodies are encouraging local producers to boost meat production to cater to the surging demand.

Fastest-growing Segment by Type - Pork : The rise of expat population and tourism in the region is driving the demand for pork meat. Fresh and chilled pork is likely to be the fastest growing pork form in the region.

Fastest-growing Segment by Country - Bahrain : The surging demand supported by constant investments to boost the local production of edible meat is projected to drive the Bahrain market, mainly through off-trade channel.

GCC Edible Meat Market Trends

Poultry is the largest segment by Type.

Poultry meat is the major edible meat type consumed in the GCC, primarily due to the large-scale production and processing of chicken in the region, with consumption volume rising by 8.42% in 2021 from 2017. Bahrain, Qatar, and Kuwait have the highest per capita consumption of mutton in the region. The rise in poultry meat consumption in Bahrain can be attributed to increased disposable income. Over the past two decades, the country has also seen an increase in the ex-pat population from Western and Asian nations, leading to a more diverse range of gastronomic preferences, including items like hamburgers. Similarly, among red meat, consumption is primarily dominated by mutton due to the religious affiliations of Bahrain's population.

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Pork is likely to be the fastest-growing meat consumed in the region, with an anticipated CAGR of 7.19% during the forecast period (2022-2028). The demand for pork increased in the region due to the increased ex-pat population and tourism. In 2020, 12.9% of the UAE population was Christian. This population group consumes all types of red meat, including pork, resulting in higher consumption.

Beef is the second-highest consumed meat in the region, and Oman has the highest per capita beef consumption, which amounted to 16.28 kgs in 2021. The country relies on beef imports from New Zealand, Pakistan, and the United Arab Emirates. Most fresh meat cuts available through online channels are New Zealand's Beef Sirloin, Topside Steak, Silverside Steak, etc. Beef registered a growth of 21.54%, by value, from 2016 to 2021.

Saudi Arabia is the largest segment by Country.

Bahrain is the fastest-growing edible meat market in the GCC, and it is expected to register a CAGR of 4.14%, by value, during the forecast period. In 2020, Bahrain witnessed an influx of around 48.9% of ex-pats from Asia and Western countries, resulting in foods like hamburgers and fried chicken becoming more popular with Bahraini consumers. The edible meat segment is largely dominated by poultry, mainly due to the religious affiliation of Bahraini consumers.

In the United Arab Emirates, the poultry demand is rising. From 2018 to 2021, poultry meat registered a growth of 32.08% by value. Amid increasing global food prices, poultry remains a comparatively cheap source of animal protein in the United Arab Emirates. As of July 2021, poultry prices were 0.5% lower than last year's and declined every month in 2021 since record high prices in 2020. As a result of lower poultry prices and a recovery in tourism, travel, and business from the impact of the COVID-19 pandemic, the demand for poultry meat increased. The consumption was registered at 441,000 metric ton in 2021, and it is expected to increase in 2022.

Oman is the second-fastest-growing edible meat market in the GCC, and it is expected to register a CAGR of 3.24%, by value, during the forecast period. The Oman Investment Authority supported various edible meat projects in the country to increase its self-sufficiency and expand the market. These projects reached meat self-sufficiency of 46% in 2022 from 37% in 2021. The major project launched its commercial operations and distribution of products in the local markets of the region in order to proliferate the edible meat market.

GCC Edible Meat Market Competitor Analysis

The GCC Edible Meat Market is fragmented, with the top five companies occupying 23.81%. The major players in this market are Al Ain Farms, Americana Foods Inc., BRF S.A., Sunbulah Group and Tanmiah Food Company (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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