

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

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Report description:

The GCC Red Meat Market is projected to register a CAGR of 2.32%

Key Highlights

Largest Segment by Type - Mutton : Mutton in the form of fresh and chilled have a higher penetration in the market for these are easily available and considered better in quality, mainly grass-fed ones.

Largest Segment by Country - Saudi Arabia : Beef is the largest consumed red meat in Saudi Arabia. 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 influx of expats into Bahrain has resulted in the globalization of cuisine preferences and a rise in the public appetite for meat products, including pork products.

GCC Red Meat Market Trends

Mutton 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.

Among all the countries, Bahrain is anticipated to be the fastest red meat-consuming country during the forecast period. It is anticipated to register a growth of 4.04% by value. As a result of the approximately 48.9% increase in ex-pats from western and Asian nations in 2020, Bahrain's cuisine preferences have become more diverse, with locals favoring items like hamburgers and sausages. Among red meat, consumption in Bahrain is largely dominated by mutton, mainly due to the religious affiliation of Bahraini consumers.

The Rest of the Middle East, which includes countries such as Iran, Iraq, Turkey, and others, was the major red meat-consuming segment in the market during the base year 2021. The segment is also anticipated to grow by 16.7%, in value, from 2022 to 2028. This is highly attributed to the increasing government support in the segment. For instance, in 2021, the head of Iran's Livestock Provision Council urged the government to support local producers of edible meat by purchasing meat at guaranteed prices. The system is implemented in 15 provinces of Iran. It proved its efficiency by increasing red meat production in Iran by 41% in the fourth month of the Iranian calendar year (July 22-August 21), compared to the same period in 2020.

Next to Bahrain, Oman is anticipated to be the fastest-growing country in the market for the consumption of red meat, with an anticipated CAGR of 3.31%, by value, during the forecast period. This is majorly due to the increasing beef consumption in the country as it is the most consumed red meat in Oman. For instance, beef consumption increased by 2.7% from 2016 to 2021.

GCC Red Meat Market Competitor Analysis

The GCC Red Meat Market is fragmented, with the top five companies occupying 23.34%. The major players in this market are Al Kabeer Group ME, BRF S.A., Herfy Food Services Co., Tanmiah Food Company and The Organic Meat Company LTD. (sorted alphabetically).

Additional Benefits:

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

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