

Saudi Arabia Edible Meat - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Saudi Arabia Edible Meat Market size is estimated at 6.51 billion USD in 2025, and is expected to reach 7.14 billion USD by 2030, growing at a CAGR of 1.89% during the forecast period (2025-2030).

Increasing investments in local production to boost the meat market in the country

- Poultry posed tough competition to the red meat category as it is the most consumed edible meat in Saudi Arabia. It had 66.5% more market share than beef and 66% more than mutton in 2021. Poultry meat is considered the primary source of protein for consumers in this country. The country records the highest per capita consumption of chicken in the world, at 50 kg annually. Due to the high prices of beef and mutton and religious restrictions on pork, poultry meat had an opportunity compared to all other meats. With the increase in production and availability, consumption is increasing across on-trade and off-trade channels. In 2020, local production accounted for 60% of the domestic poultry consumption of the country.
- Except for other meats, beef is predicted to be the fastest-growing edible meat to be consumed in Saudi Arabia. It is projected to register a CAGR of 2.94% by value during the forecast period. Most Saudi Arabian consumers prefer slow-cooked meat like beef, which offers a premium taste. With the increase in the expat population, beef demand also increased. Almost 1/3 of the population in the country is expats.
- Most of the country's edible meats are imported. To reduce the dependency on imports, Saudi Arabia launched the National Industrial Development and Logistics Program (NIDLP) to boost the production of edible meat from 2020 to 2025. It aims to reinforce food security by establishing a regional food hub to ensure that local manufacturers meet all food needs in the country. Specialized manufacturing clusters will be established, linking farmers, manufacturers, packaging plants, and retail companies to enable the local food processing sector of edible meat to meet 85% of the local demand for processed food products by 2030.

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Saudi Arabia Edible Meat Market Trends

The government is providing various financial subsidies to encourage local production

- Of all the countries in the Middle East, Saudi Arabia accounted for a share of 3.60% in 2022 in terms of beef production.. The overall production of beef in Saudi Arabia decreased by 7.80% from 2017 to 2022. Hence, the production is likely to be boosted by various government initiatives and policies, such as government assistance to lower the cost of producing red meat in the Kingdom of Saudi Arabia through direct financial subsidies based on monthly production, interest-free loans, and rebates for the purchase of cattle equipment. Using more than 70% local content is required of caterers who provide food to government institutions (hospitals, schools, and universities). Easy access to labor, approval of foreign suppliers, and a streamlined licensing and permit process will allow for faster industry localization.
- Beef production is predicted to increase from 2023 to 2029 because consumers demand more premium beef, which is grass-fed and locally produced. Most Saudi Arabian consumers prefer fresh meat over frozen and processed forms. The market is seeing a relaxation of regulations, like an increase in the shelf life for chilled beef sold in Saudi Arabia by 50 days to the new standard of 120 days by the Saudi Food and Drug Authority.
- Out of the total meat produced in the country, beef accounted for only 2.26% in 2022. Private and government entities are taking various initiatives to uplift local production in the country. The partnership by Saudi Agricultural and Livestock Investment Co. (SALIC) with Brazil's Minerva Foods to set up a joint venture for the processing and export of beef is expected to enhance operating synergies, reduce risks, and contribute to an increase in the production of beef.

Initiatives to increase local production are expected to optimize the prices during the forecast period

- The overall price of beef in Saudi Arabia increased by 5.26% from 2016 to 2022. In 2022, the price per kg of beef was around USD 4, an increase of 0.96% from 2021. The price increase was mainly due to the implementation of value-added tax (VAT) in 2018. The introduction of value-added tax, along with rising inflation from 2019, led to an increase in the prices of beef and associated costs like production prices, feed prices, manufacturing prices, and export prices since 2019.
- The increase in food prices across different channels raised the consumer price index. With the VAT raised from 5% to 15%, transportation prices increased by 19.3% compared to the previous year. The Cabinet enacted Decision No. 599 to amend the Harmonized Tariff Schedule and increase customs duty rates, which increased the landing cost of beef, and the new tax rate of 7-25% levied on the prices resulted in a spike in 2021.
- Beef prices in 2022 increased because of an 11.5% rise in the wholesale price index (WPI) compared to the previous year. The number of live animals, like cattle, in Saudi Arabia also increased by 9%, and the associated costs, like producer prices, also soared to 151 base points compared to 2021. Due to increased local demand, the Saudi Food and Drug Authority (SFDA) lifted its suspension on Brazilian meat imports in 2021. Saudi Arabia is attracting foreign investors to boost local production, thus reducing the prices. Productivity-adjusted wages in the country do not include the annual recurring charge of USD 1.23/hour for a work permit, resident identity (iqama), and health insurance, which is likely to reduce the production charges for manufacturers.

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Saudi Arabia Edible Meat Industry Overview

The Saudi Arabia Edible Meat Market is fragmented, with the top five companies occupying 11.12%. The major players in this market are Almarai Food Company, BRF S.A., Sunbulah Group, Tanmiah Food Company and The Savola Group (sorted alphabetically).

Additional Benefits:

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

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 INTRODUCTION

2.1 Study Assumptions & Market Definition

2.2 Scope of the Study?

2.3 Research Methodology

3 KEY INDUSTRY TRENDS

3.1 Price Trends

3.1.1 Beef

3.1.2 Mutton

3.1.3 Poultry

3.2 Production Trends

3.2.1 Beef

3.2.2 Mutton

3.2.3 Poultry

3.3 Regulatory Framework

3.3.1 Saudi Arabia

3.4 Value Chain & Distribution Channel Analysis

4 MARKET SEGMENTATION (includes market size in Value in USD, Forecasts up to 2030 and analysis of growth prospects)

4.1 Type

4.1.1 Beef

4.1.2 Mutton

4.1.3 Poultry

4.1.4 Other Meat

4.2 Form

4.2.1 Canned

4.2.2 Fresh / Chilled

4.2.3 Frozen

4.2.4 Processed

4.3 Distribution Channel

4.3.1 Off-Trade

4.3.1.1 Convenience Stores

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- 4.3.1.2 Online Channel
- 4.3.1.3 Supermarkets and Hypermarkets
- 4.3.1.4 Others
- 4.3.2 On-Trade

5 COMPETITIVE LANDSCAPE

- 5.1 Key Strategic Moves
- 5.2 Market Share Analysis
- 5.3 Company Landscape
- 5.4 Company Profiles (includes Global level Overview, Market level overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and analysis of Recent Developments)
 - 5.4.1 Al-Watania Poultry
 - 5.4.2 Almarai Food Company
 - 5.4.3 BRF S.A.
 - 5.4.4 Golden chicken farm factory company CJSC
 - 5.4.5 Halwani Brothers Company
 - 5.4.6 Sunbulah Group
 - 5.4.7 Tanmiah Food Company
 - 5.4.8 The Savola Group

6 KEY STRATEGIC QUESTIONS FOR MEAT INDUSTRY CEOS

7 APPENDIX

- 7.1 Global Overview
 - 7.1.1 Overview
 - 7.1.2 Porter's Five Forces Framework
 - 7.1.3 Global Value Chain Analysis
 - 7.1.4 Market Dynamics (DROs)
- 7.2 Sources & References
- 7.3 List of Tables & Figures
- 7.4 Primary Insights
- 7.5 Data Pack
- 7.6 Glossary of Terms

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