

Saudi Arabia Red Meat - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Saudi Arabia Red Meat Market Analysis

The Saudi Arabia red meat market is expected to grow from USD 1.38 billion in 2025 to USD 1.42 billion in 2026 and is forecast to reach USD 1.67 billion by 2031 at 3.21% CAGR over 2026-2031. The steady growth trajectory masks a strategic transformation driven by Vision 2030 initiatives that prioritize food security, domestic livestock modernization, and cold-chain upgrades. Government-backed projects such as the USD 2 billion livestock city announced in January 2025, combined with SALIC's expanded international sourcing network, signal a decisive shift toward resilient supply chains. Consumer demand also pivots toward premium, traceable meat, propelling organic offerings and processed formats within the broader Saudi Arabia red meat market. Meanwhile, off-trade retail retains scale, but on-trade sales accelerate as hospitality expansion underpins higher consumption in restaurants, hotels, and tourist destinations.

Saudi Arabia Red Meat Market Trends and Insights

Increasing health awareness promoting nutrient-rich red meat intake

Saudi Arabia's updated dietary guidelines position lean red meat as a cornerstone of the national nutrition framework, with the Saudi Healthy Plate 2024 explicitly recommending red meat as part of balanced protein intake. This official endorsement counters global trends toward plant-based alternatives and reinforces red meat's role in addressing nutritional deficiencies prevalent in the Kingdom. The government's focus on combating obesity and diabetes through structured nutrition programs creates demand for

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high-quality, lean cuts that align with medical recommendations. Urban consumers increasingly seek grass-fed and organic variants, driving premiumization trends that benefit domestic producers investing in quality certification systems. The integration of nutrition labeling requirements by the Saudi Food and Drug Authority enhances consumer awareness of protein content and nutritional benefits, supporting sustained demand growth in health-conscious segments.

Cultural and religious preference for halal-certified red meat

Halal certification requirements protect the market while adding complexity to the supply chain. Saudi Standards, Metrology and Quality Organization standards require businesses to provide detailed documentation at every stage, from slaughter to retail distribution, ensuring compliance with halal guidelines. The Kingdom, as the custodian of Islam's holiest sites, intensifies its scrutiny of halal compliance, particularly during the Hajj and Umrah seasons when meat consumption rises significantly. To modernize processes while maintaining religious standards, Ministry of Environment, Water and Agriculture launched an electronic booking system in June 2025, enabling efficient scheduling of sacrificial animal slaughters. The Saudi Culinary Arts Commission has actively documented meat-based dishes from all 13 provinces, showcasing the strong cultural connection to specific preparation methods and cuts. This combination of strict religious requirements and deeply rooted cultural preferences creates significant entry barriers for international suppliers while giving established halal-certified producers a distinct competitive advantage.

Fluctuating prices of red meat due to supply-demand imbalances

Red Sea shipping disruptions during 2024-2025 exemplify the price volatility risks facing Saudi Arabia's import-dependent meat supply chains, with container freight rates surging over 130% and transit times extending by 10-20 days. The Kingdom's reliance on Brazilian beef imports, valued at USD 1.29 billion in 2024, creates exposure to currency fluctuations, drought conditions, and export policy changes in origin countries. Seasonal demand spikes during Ramadan and Eid celebrations strain supply chains and drive temporary price increases that disproportionately affect middle-income consumers. The government's green fodder cultivation ban, implemented in 2018 to conserve water resources, forces livestock producers to rely on imported feed ingredients, adding another layer of cost volatility. Climate-driven production disruptions in major exporting regions, combined with energy price inflation affecting transportation costs, create persistent upward pressure on retail prices that constrains market expansion in price-sensitive segments.

Other drivers and restraints analyzed in the detailed report include:

Expansion of cold chain infrastructure facilities
Government initiatives under Vision 2030 to boost domestic production
Health concerns related to excessive red meat consumption

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Beef continues to dominate the Saudi Arabia red meat market, accounting for 56.84% of the total share in 2025. This strong position is underpinned by well-established supply chains that ensure consistent availability across both retail and foodservice channels. Consumer familiarity with beef, particularly international cuts and diverse preparation methods, further reinforces its widespread demand. The segment benefits from strong integration into global trade networks, allowing for the import of premium-quality beef to meet rising consumption needs. In addition, quick-service restaurants and fine dining establishments have contributed to the popularity of beef dishes, widening its appeal among different consumer demographics. With stable demand drivers and strong market penetration, beef is expected to remain the cornerstone of Saudi Arabia's red meat market over the coming years.

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Mutton has emerged as the fastest-growing segment, projected to expand at a CAGR of 3.74% from 2025 to 2031. Its growth is deeply rooted in cultural traditions, as mutton holds a strong premium positioning within Saudi cuisine, particularly for festive and ceremonial occasions. Rising disposable incomes are further contributing to increased consumption, with consumers showing greater willingness to pay for high-quality and locally sourced mutton products. The growth of specialty butcheries and premium retail outlets is also enhancing accessibility and reinforcing mutton's image as a culturally significant and premium choice. Moreover, the foodservice sector, especially traditional restaurants, continues to drive demand by offering a variety of heritage-based dishes centered on mutton.

Traditional meat continues to hold an overwhelming dominance in the Saudi Arabia red meat market, accounting for 88.62% of the market share in 2025. This commanding position is largely driven by entrenched consumption habits and cultural preferences that favor conventional meat options across households and foodservice sectors. Price sensitivity also plays a key role, as traditional meat remains more affordable than premium alternatives, appealing to a broad base of consumers. The widespread availability of conventional meat through butcheries, supermarkets, and wet markets further strengthens its dominance in daily consumption. Strong supply chain integration and reliable import channels also ensure stable supply, reinforcing consumer dependence on traditional offerings. Given these factors, traditional meat is expected to retain its significant share in the coming years, even as niche categories like organic continue to gain momentum.

Organic meat, on the other hand, is emerging as the fastest-growing segment in Saudi Arabia, projected to expand at a CAGR of 3.55% through 2031. The segment's growth reflects a rising premiumization trend among affluent consumers who are increasingly attentive to health, quality, and sustainability. Organic meat is particularly attractive to higher-income households, who value chemical-free, traceable, and ethically produced options. Growing awareness of wellness and dietary balance is further driving shifts toward clean-label protein consumption. In addition, the expansion of specialty retail outlets, gourmet stores, and online platforms is improving accessibility and visibility of organic meat products. As government initiatives promote healthier lifestyles and consumers show a willingness to pay for quality and authenticity, organic meat is set to establish itself as a crucial growth catalyst in Saudi Arabia's evolving red meat market.

The Saudi Arabia Red Meat Market Report is Segmented by Product Type (Beef, Mutton, Other Meat), Category (Traditional Meat and Organic Meat), Form (Fresh/Chilled, Frozen, Canned, Processed), Distribution Channel (On-Trade and Off-Trade), and Geography (Saudi Arabia). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Units).

List of Companies Covered in this Report:

Almunajem Foods Americana Group BRF S.A. Tanmiah Food Company Sunbulah Group The Savola Group Mahmoud Al Nasher & Partners Co. The Organic Meat Company Ltd Al Islami Foods Al Kabeer Group Sadia International Marfrig Global Foods Tyson Foods JBS S.A. Danish Crown ABP Food Group Northern Farms Frozen Food Factory Afia International Chef International

Additional Benefits:

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

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