

GCC Edible Meat - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

GCC Edible Meat Market Analysis

The GCC edible meat market was valued at USD 19.96 billion in 2025 and estimated to grow from USD 20.88 billion in 2026 to reach USD 26.17 billion by 2031, at a CAGR of 4.63% during the forecast period (2026-2031). The market growth is driven by increasing demand for high-quality, halal-certified, and premium meat products, along with population growth and higher disposable incomes in the region. The expanding hospitality and tourism sectors contribute significantly to market growth by demanding diverse meat products for international cuisines and fine dining. GCC governments are investing in food security initiatives and domestic meat production to enhance self-sufficiency and strengthen supply chains. The market is also benefiting from evolving consumer preferences toward convenience foods and processed meats, which encourage product innovation and advanced processing methods. The GCC meat market continues to grow through modernization, infrastructure development, and strong cultural demand for halal meat, in line with the region's economic and demographic changes.

GCC Edible Meat Market Trends and Insights

Increased domestic poultry production

The growth of the GCC edible meat market is driven by increased domestic poultry production. Saudi Arabia has made progress toward self-sufficiency in poultry production, which reduces import dependence and improves supply stability. According to the General Authority for Statistics (GASTAT), Saudi Arabia produced over 1.1 million tons of broiler chicken in 2023, with the Riyadh

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region producing 282 thousand tons, the highest among all regions . Government policies under Vision 2030 support this domestic production through subsidies, loans, and infrastructural support to poultry farmers, creating conditions for production expansion. Locally produced, affordable poultry meat appeals to price-sensitive consumers across the region, increasing consumption. Domestic production also improves meat quality and traceability, delivering fresher products that comply with halal certification standards, which are essential in GCC markets. This has led to innovations in poultry processing and value-added products that meet consumer demands for convenient and healthy food options. Regional poultry companies are forming partnerships with international players to increase production capacity and facilitate technology transfer, strengthening market infrastructure.

Growing preference for halal-certified meat products

The GCC edible meat market is experiencing significant growth driven by the demand for halal-certified meat products. The region's Muslim-majority population prioritizes meat that complies with halal dietary laws, where animals are slaughtered and processed according to Islamic principles. This religious and cultural requirement creates sustained consumer trust and demand for halal-certified products. The market growth is further supported by increased consumer awareness of food safety and quality standards, as halal certification ensures products are processed under strict religious guidelines and are free from prohibited substances. The rising urbanization and higher disposable incomes in the region have led consumers to seek premium and value-added halal meat products. In April 2025, Muscat Livestock (MLS) Oman and Muscat Livestock (MLS) United Arab Emirates formed a partnership to distribute premium halal meat across the region. This collaboration aims to enhance supply chain transparency, maintain product integrity, and improve regional distribution networks. These developments support both domestic consumption and export opportunities, as GCC countries establish themselves as key centers for halal-certified meat distribution.

Underdeveloped local supply chain and production

Underdeveloped local supply chain and production constrain the GCC edible meat market, limiting the region's ability to meet growing demand with local products. The harsh desert climate, limited water availability, and scarce arable land restrict the expansion of livestock farming and meat production within GCC countries. The region relies heavily on imports to meet its meat requirements, making it vulnerable to global supply chain disruptions, international price fluctuations, and geopolitical risks. This dependence increases operational costs through higher logistics and storage expenses. The fragmented local supply chains and inadequate cold chain infrastructure lead to increased food wastage and reduced efficiency. Limited local production capacity also hinders innovation and responsiveness to consumer demands for halal certification, product quality, and traceability. These challenges affect the entire supply chain ecosystem, from breeding and farming to slaughtering, processing, and distribution, requiring substantial investment and modernization to enhance productivity and reduce import dependence.

Other drivers and restraints analyzed in the detailed report include:

Expansion of hospitality and tourism sectors
Innovations in ready-to-cook and processed meat products
Competition from plant-based alternatives

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

Segment Analysis

Poultry holds a 63.10% market share in the GCC edible meat market in 2025, driven by multiple factors. The significant increase in domestic production stems from government initiatives focused on food security, including simplified land acquisition processes, farming equipment loans, and feed and livestock subsidies that encourage local poultry farming. Poultry meat's broad cultural and religious acceptance, particularly its halal certification compliance, aligns with regional dietary preferences, establishing it as a primary protein source. The meat's versatility spans fresh, processed, and ready-to-cook products, meeting the

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increasing demand for convenient and healthy food options. Enhanced farming practices and biosecurity measures have reduced production costs and enhanced meat quality, enabling producers to meet consumer demand effectively.

The mutton segment in the GCC edible meat market projects a CAGR of 4.69% through 2031, surpassing other red meat categories. Mutton maintains cultural significance across GCC countries, featuring prominently in traditional dishes like biryanis, kebabs, and stews, particularly during festivals and family gatherings. Consumer demand focuses on fresh, high-quality, halal-certified mutton across both household and foodservice sectors. The market shows increasing preference for premium products, including grass-fed and organic options, reflecting heightened health consciousness. The segment's growth is supported by investments in local sheep farming infrastructure and improvements in supply chain and processing capabilities.

Traditional meat holds a 67.40% market share in the GCC edible meat market in 2025, reflecting consumer preferences shaped by cultural practices, established eating patterns, and price considerations. This dominance stems from the population's reliance on conventional meats like beef, mutton, poultry, and camel meat, which are integral to daily meals and special occasions. Traditional meat maintains its position due to its perceived freshness and cultural significance in regional cuisine, particularly during family gatherings, religious celebrations, and social events. The competitive pricing of traditional meat compared to premium, organic, or alternative proteins makes it accessible across different income levels.

The organic meat segment in the GCC edible meat market is growing at a CAGR of 5.48%, driven by increased consumer awareness and demand for healthier, chemical-free meat products. This growth corresponds with rising health consciousness, higher disposable incomes, and consumer preference for natural food options. Consumers perceive organic meat as a safer, more nutritious, and environmentally sustainable choice. Government initiatives supporting sustainable agriculture and food security contribute to the organic meat market's development. In June 2025, Sharjah Agricultural and Livestock Production (EKTIFA) launched FILI Poultry, an organic fresh chicken brand available in various sizes, addressing the increasing demand for organic poultry products in the region. This launch demonstrates regional producers' efforts to serve the organic meat segment by offering certified organic options that align with changing consumer preferences.

The GCC Edible Meat Market Report is Segmented by Product Type (Beef, Mutton, Poultry, and Other Meat Types), Category (Traditional Meat and Organic Meat), Form (Canned, Fresh/Chilled, Frozen, and Processed), Distribution Channel (On-Trade and Off-Trade), and Geography (Saudi Arabia, United Arab Emirates, Qatar and More). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Tons).

List of Companies Covered in this Report:

Ghitha Holding PJSC Al Islami Foods Americana Group Inc. BRF S.A. JBS S.A. Almarai Company Taiba Farms Tanmiah Food Company Sunbulah Group The Savola Group Al Kabeer Group Najmat Taiba Foodstuff LLC Qatar Meat Production Company Siniora Food Industries Golden Gate Meat Company Sadara Commercial Representation W.L.L Siniora Food Industries Company Emirates Modern Poultry (Al Rawdah) A'ayan Meat (Oman) Freshly Frozen Foods

Additional Benefits:

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

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