

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

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Report description:

GCC Red Meat Market Analysis

The GCC red meat market is expected to grow from USD 4.12 billion in 2025 to USD 4.2 billion in 2026 and is forecast to reach USD 4.62 billion by 2031 at 1.92% CAGR over 2026-2031. The demand remains robust, driven by several key factors. A strong cultural affinity for mutton continues to play a significant role in sustaining consumption levels. Additionally, the rise in foodservice activities, fueled by increasing tourism across the region, has further boosted demand. Government investments in food security initiatives, aimed at reducing risks associated with import dependencies, also contribute to market stability. Saudi Arabia's duty-free access to fresh red meat enhances affordability, while the UAE's efficient import-facilitation logistics streamline supply chains. Qatar's expanded hospitality sector, following the 2022 FIFA World Cup, has created a lasting impact on red meat consumption patterns. However, the market faces certain challenges, including fluctuations in feed-grain prices and the growing popularity of plant-based alternatives, which could temper growth momentum. Despite these challenges, the market benefits from a sustained household preference for halal-certified proteins, which remain a dietary staple in the region. Furthermore, ongoing upgrades to cold-chain infrastructure at ports and distribution centers ensure the efficient handling and distribution of red meat products. These factors collectively support the market's continued, albeit modest, expansion over the forecast period.

GCC Red Meat Market Trends and Insights

Increasing health awareness promoting nutrient-rich red meat intake

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tel. 0048 603 394 346 e-mail: support@scotts-international.com

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Consumer education campaigns are actively reshaping purchasing decisions across Gulf markets by emphasizing the high protein density and rich micronutrient profile of red meat. Qatar's health authority has reinforced this shift by recommending a weekly consumption of 455g of red meat, offering official validation for moderate intake levels and addressing earlier dietary restrictions. This regulatory support is encouraging market expansion as consumers increasingly trust and adopt balanced red meat consumption as part of their diets. Premium cuts and organic segments are witnessing notable growth, as health-conscious demographics respond enthusiastically to targeted nutritional messaging. However, this influence remains predominantly concentrated in urban centers, where health awareness campaigns achieve the greatest reach and impact. The long-term sustainability of this trend depends on consistent government efforts to promote balanced dietary guidelines, steering clear of restrictive health warnings that could undermine consumer confidence and market growth.

Increasing adoption of Western dietary habits with higher red meat intake

The increasing adoption of Western dietary habits in the GCC region is a significant driver of the red meat market. As lifestyles modernize and incomes rise, consumers are incorporating more red meat into their diets, inspired by Western food culture that emphasizes higher protein intake. This shift is particularly noticeable among the younger and urban population, who favor Western-style cuisines such as steaks, burgers, and grilled meats that prominently feature beef and other red meats. The growing restaurant and foodservice sectors also promote these eating habits, providing wider access to diverse red meat preparations. With greater exposure to global food trends, GCC consumers are embracing these habits while still valuing traditional dishes. This convergence of cultural preferences fuels rising demand for red meat, supporting market growth across countries like Saudi Arabia, UAE, and Kuwait. The trend also encourages investment in high-quality meat products that align with evolving consumer tastes and preferences.

Growing awareness of health concerns related to red meat

A growing awareness of health concerns related to red meat consumption is an emerging restraint impacting the GCC red meat market. Consumers are becoming increasingly conscious of the potential health risks associated with high red meat intake, including cardiovascular diseases and other health issues linked to processed and excessive red meat consumption. This heightened health awareness has prompted some segments of the population to reduce their red meat intake or switch to leaner alternatives such as white meat or plant-based proteins. Additionally, there is a rising demand for transparency in sourcing, halal certification, and sustainable practices, which influences purchasing decisions. The market is also witnessing a shift towards healthier, more organic, and grass-fed meat options, as consumers seek products that align with their wellness and sustainability goals. This shift in consumer perception and behavior presents a challenge to traditional red meat consumption patterns but also offers opportunities for markets and producers to innovate with healthier options.

Other drivers and restraints analyzed in the detailed report include:

Growing tourism, hospitality, and foodservice sector
Increasing investments in meat processing and technology
Increasing popularity of plant-based and alternative proteins

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

Segment Analysis

Mutton holds a commanding 54.02% share of the GCC red meat market in 2025, underscoring its deep cultural and religious significance across the Gulf Cooperation Council societies. Sheep and goat meat have long been integral to traditional dietary patterns, especially in celebratory and religious meals such as Eid and other festivals. The preference for mutton is sustained by strong consumer loyalty and the availability of quality imports from suppliers like Australia, New Zealand, and India. Fresh and

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chilled mutton remains the preferred form, favored for its flavor and texture in regional specialties like kebabs and biryanis. The market's size and entrenched demand are supported by a well-developed distribution network comprising both modern retail and traditional meat markets. This dominant share highlights mutton's pivotal role as the preferred protein source across GCC countries such as Saudi Arabia, the UAE, and Kuwait.

Meanwhile, beef is anticipated to witness steady growth in the forecast period. It is projected to expand at a compound annual growth rate (CAGR) of 2.65% through 2031. This growth is likely fueled by increasing consumer awareness of protein-rich diets and the rising popularity of beef-based products. Additionally, the growing presence of premium beef offerings and the expansion of foodservice channels, such as restaurants and quick-service outlets, are contributing to the rising demand for beef. The introduction of value-added beef products, such as processed and ready-to-cook options, is also expected to attract a broader consumer base. These factors collectively position beef as a promising segment within the GCC red meat market during the forecast period.

Traditional meat products dominate the GCC red meat market with a substantial 89.45% share in 2025, underscoring the strong consumer preference for conventional meat offerings. This overwhelming market control is supported by well-established supply chains that ensure consistent availability throughout the region. Price competitiveness plays a crucial role, making traditional meat products accessible to a wide demographic. Furthermore, consumer familiarity and cultural dietary preferences heavily favor traditional varieties of red meat. The sector benefits from extensive retail and wholesale channels, ranging from traditional butcher shops to modern supermarkets, which cater to diverse consumer needs. Despite the growing interest in alternative options, traditional meat's stronghold remains entrenched by its longstanding presence and proven quality assurance in the GCC market.

In contrast, the organic meat segment is emerging as the fastest-growing category, with a notable CAGR of 2.88% projected through 2031. This growth is primarily driven by rising health consciousness among consumers seeking premium, chemical-free products. Organic meat's premium positioning appeals particularly to affluent and urban segments increasingly prioritizing sustainability and wellness. However, the organic category faces significant challenges including limited local production capacity, which hampers scalability and widespread availability. Higher production and retail costs also pose barriers to broader consumer adoption. Additionally, knowledge gaps persist among both producers and consumers regarding organic certification standards. Nonetheless, as these barriers are addressed, organic meat is poised to carve out a meaningful and profitable niche within the GCC red meat market.

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

List of Companies Covered in this Report:

BRF S.A. JBS S.A. Tanmiah Food Company The Organic Meat Company Ltd The Savola Group Almarai Company Americana Group Al Islami Foods Siniora Food Industries Al Ain Farms National Food Company Al Aqsa Group Al Kabeer Group Gulf Meat Company Albatha Group Al Barakah Group United Food Industries Al Hayat Meat & Trading Al Islami Holdings National Meat Company

Additional Benefits:

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

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