

## **United Arab Emirates Edible Meat - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-02-09 | 196 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

United Arab Emirates Edible Meat Market Analysis

The UAE edible meat market was valued at USD 2.03 billion in 2025 and estimated to grow from USD 2.06 billion in 2026 to reach USD 2.23 billion by 2031, at a CAGR of 1.55% during the forecast period (2026-2031). Despite reaching a mature phase, the UAE's edible meat market continues to thrive, buoyed by a resurgence in tourism, a diverse expatriate community, and a government initiative aiming for 50% food self-sufficiency by 2030. The government is not only incentivizing local livestock farming but also expanding the reach of halal certifications. Coupled with significant investments in cold-chain infrastructure, these moves are helping producers reduce lead times and minimize spoilage. Leading processors are consolidating their bargaining power through vertical integration. At the same time, tools like precision livestock farming and IoT are being leveraged to counterbalance the fluctuating costs of grain imports, which constitute over 85% of livestock feed. On the demand front, younger consumers are gravitating towards lean poultry and premium mutton cuts with clear halal endorsements. Yet, their experimentation with hybrid protein diets is pushing suppliers to diversify their product offerings while ensuring adherence to religious standards.

United Arab Emirates Edible Meat Market Trends and Insights

Robust tourism-led foodservice demand

In 2024, hotel occupancy in Dubai rose to 77%, up from 71% in 2023. This significant increase in occupancy has driven higher meat orders from restaurants, catering firms, and airline kitchens, all of which require a consistent halal-certified supply to meet

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

the growing demand. Distributors, anticipating seasonal peaks during winter festivals and major events, are strategically building buffer stocks while ensuring the freshness of their products to maintain quality standards. In 2024, tourism accounted for 57.42% of sales, highlighting a structural reliance on the hospitality sector. However, airlines, convention centers, and cruise operators are also emerging as additional channels for premium beef and mutton, contributing to the diversification of demand. Adhering to HACCP guidelines set by the Dubai Municipality not only ensures food safety but also bolsters visitor confidence, making it a key competitive edge in the market. Processors that can deliver chilled cuts within 24 hours post-slaughter are reaping higher margins, underscoring the significance of having cold-chain nodes in proximity to streamline operations and meet time-sensitive requirements.

#### Government 50% food-security self-sufficiency target

Under the National Food Security Strategy 2051, grants, subsidized land leases, and research and development vouchers bolster integrated farms and feed-mill projects, targeting 50% domestic self-sufficiency by 2030. Programs like "Plant the Emirates" not only expand organic livestock holdings but also promote a symbiotic relationship between aquaculture and livestock, achieving a remarkable 90% reduction in water usage. Al Ain Farms' merger of five brands in May 2025, backed by public-private capital, showcases a strategic move to create a national champion, with ambitions to produce 800 million eggs annually and boost poultry output within five years. Local banks are extending soft-rate loans for solar-powered sheds, helping farmers cut down on electricity bills, which often surpass 20% of their operating costs. With domestic volumes on the rise, the reliance on imported chilled poultry has diminished, leading to reduced currency outflows and a more resilient supply chain.

#### High dependence on imported feed grains

Freight disruptions can delay corn and soybean shipments from Latin America and the Black Sea by two weeks. These delays disrupt the supply chain, forcing spot purchases at surge prices, which significantly inflate poultry break-even costs. In 2024, corn prices surged by 35%, creating financial strain on smallholders who lack access to hedging instruments to mitigate such risks. Local efforts to cultivate sorghum as an alternative face significant challenges due to water scarcity, further limiting the effectiveness of strategic national grain reserves as a buffer against supply shocks. While processors have passed some of these increased costs to consumers-evidenced by a 4% uptick in retail chicken prices last Ramadan-repeated price hikes could lead to demand erosion. This risk is particularly pronounced among lower-income expatriate households, who are more sensitive to price fluctuations in essential goods like poultry.

Other drivers and restraints analyzed in the detailed report include:

Halal certification leadership expanding exports Cold-chain investments across GCC retail Stringent carbon-footprint mandates on red-meat processors

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

#### Segment Analysis

In 2025, the UAE's poultry sector, a key player in the country's edible meat market, boasted a valuation of USD 1.19 billion, securing a commanding 58.74% share. This dominance is bolstered by the sector's cost efficiency and adherence to religious standards. Based on advancements like automated hatcheries and robotic defeathering, production costs per kilo have dipped by 7% since 2023. This reduction empowers local brands to competitively price against imports and ensures swift delivery in under 24 hours. While foodservice operators appreciate chicken's culinary flexibility, retail consumers prioritize halal certifications and family-sized packaging for budget-friendly shopping. Responding to health trends, producers are enriching chicken feed with omega-3s, appealing to parents who see this as a step towards their children's balanced diets.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Forecasted to grow at a brisk 2.28% CAGR through 2031, mutton is aligning its market share with the UAE's premium dining and cultural trends. Upscale eateries in Dubai Creek and Saadiyat Island are showcasing lamb cuts, traceable to farms and flown in within 48 hours, and are pricing them 20% higher than standard offerings. Leveraging grant-supported paddock shelters and automated milking, local goat breeders are boosting mutton availability, especially during Eid, by enhancing offspring survival rates. Innovative feed trials are replacing imported alfalfa with locally sourced blue panic grass, achieving a 12% reduction in costs and lessening water usage, signaling a promising future for scalability.

The UAE Edible Meat Market Report is Segmented by Type (Beef, Mutton (Goat, Sheep), Poultry (Chicken, Other Poultry), Other Meat), Form (Canned, Fresh/Chilled, Frozen, Processed (Nuggets, Sausages, Meatballs, Deli Meats, Marinated/Tenders, Other Processed Meat)), Distribution Channel (HoReCa (Hotels, Restaurants, Catering), Retail, and Geography (UAE). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Tons).

List of Companies Covered in this Report:

Al Ain Farms Albatha Group Americana Group BRF S.A. IFFCO Group JBS S.A. Siniora Food Industries Tanmiah Food Company The Savola Group Emirates Modern Poultry (Al Rawdah) Al Islami Foods Al Kabeer Group Freshly Frozen Foods Emirates Meat Dubai Abattoirs Co. National Food Products Company Gulf Meat & Products Co. Barakat Quality Plus Al Rawabi Dairy Co. Al Futtaim Retail (Food)

Additional Benefits:

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

#### **Table of Contents:**

#### 1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

#### 2 RESEARCH METHODOLOGY

#### 3 EXECUTIVE SUMMARY

#### 4 MARKET LANDSCAPE

4.1 Market Overview

4.2 Price Trends

4.2.1 Beef

4.2.2 Mutton

4.2.3 Poultry

4.3 Production Trends

4.3.1 Beef

4.3.2 Mutton

4.3.3 Poultry

4.4 Market Drivers

4.4.1 Robust tourism-led foodservice demand

4.4.2 Government targets for 50% food-security self-sufficiency by 2030

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

- 4.4.3 Halal certification leadership enhancing export potential
- 4.4.4 Cold-chain infrastructure investments across GCC retail
- 4.4.5 Rapid adoption of precision livestock farming and IoT
- 4.4.6 Rise of private-label chilled meat in modern trade
- 4.5 Market Restraints
  - 4.5.1 High dependence on imported feed grains
  - 4.5.2 Stringent carbon-footprint mandates on red-meat processors
  - 4.5.3 Volatile expatriate population post-Expo cycles
  - 4.5.4 Cultural shift toward flexitarian diets
- 4.6 Supply Chain Analysis
- 4.7 Regulatory Landscape
- 4.8 Trade Analysis
  - 4.8.1 Import Analysis
  - 4.8.2 Export Analysis
- 4.9 Porter's Five Forces
  - 4.9.1 Bargaining Power of Suppliers
  - 4.9.2 Bargaining Power of Buyers
  - 4.9.3 Threat of New Entrants
  - 4.9.4 Threat of Substitutes
  - 4.9.5 Intensity of Competitive Rivalry

## 5 MARKET SIZE AND GROWTH FORECASTS (VALUE AND VOLUME)

- 5.1 By Type
  - 5.1.1 Beef
  - 5.1.2 Mutton
    - 5.1.2.1 Goat
    - 5.1.2.2 Sheep
  - 5.1.3 Poultry
    - 5.1.3.1 Chicken
    - 5.1.3.2 Other Poultry
  - 5.1.4 Other Meat
- 5.2 By Form
  - 5.2.1 Canned
  - 5.2.2 Fresh/Chilled
  - 5.2.3 Frozen
  - 5.2.4 Processed
    - 5.2.4.1 Nuggets
    - 5.2.4.2 Sausages
    - 5.2.4.3 Meatballs
    - 5.2.4.4 Deli Meats
    - 5.2.4.5 Marinated/Tenders
    - 5.2.4.6 Other Processed Meat
- 5.3 By Distribution Channel
  - 5.3.1 HoReCa
    - 5.3.1.1 Hotels
    - 5.3.1.2 Restaurants
    - 5.3.1.3 Catering

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

### 5.3.2 Retail

#### 5.3.2.1 Supermarkets/Hypermarkets

#### 5.3.2.2 Convenience/Grocery Stores

#### 5.3.2.3 Online Retail Stores

#### 5.3.2.4 Other Distribution Channels

## 6 COMPETITIVE LANDSCAPE

### 6.1 Market Concentration

### 6.2 Strategic Moves

### 6.3 Market Share Analysis

### 6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)

#### 6.4.1 Al Ain Farms

#### 6.4.2 Albatha Group

#### 6.4.3 Americana Group

#### 6.4.4 BRF S.A.

#### 6.4.5 IFFCO Group

#### 6.4.6 JBS S.A.

#### 6.4.7 Siniora Food Industries

#### 6.4.8 Tanmiah Food Company

#### 6.4.9 The Savola Group

#### 6.4.10 Emirates Modern Poultry (Al Rawdah)

#### 6.4.11 Al Islami Foods

#### 6.4.12 Al Kabeer Group

#### 6.4.13 Freshly Frozen Foods

#### 6.4.14 Emirates Meat

#### 6.4.15 Dubai Abattoirs Co.

#### 6.4.16 National Food Products Company

#### 6.4.17 Gulf Meat & Products Co.

#### 6.4.18 Barakat Quality Plus

#### 6.4.19 Al Rawabi Dairy Co.

#### 6.4.20 Al Futtaim Retail (Food)

## 7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

**United Arab Emirates Edible Meat - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-02-09 | 196 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scott's-international.com

**ORDER FORM:**

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scott's-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-27"/>
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

