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Saudi Arabia Meat Market: Current Analysis and Forecast (2025-2033)

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Abstracts

Meat is a nutritious food derived from the edible parts of animals that consists of several groups, including red meat (beef, lamb, goat), white meat (poultry), and processed foods such as sausage or cold cuts. Meat is a staple of the Saudi diet, rich in protein, essential vitamins, and minerals, and it holds cultural and religious significance, especially in regard to meals being served in accordance with halal requirements.

The Saudi Arabian meat market is expected to show a growth rate of 4.84% during the forecast period (2025-2033F). The demand for premium, fresh, convenient, and processed meat products is being driven by urbanization and rising disposable income levels. Moreover, the government programs associated with Vision 2030 focus on increasing local production and reducing the level of importation, which stimulates investment in domestic farm and factory facilities. Furthermore, with the growth of both tourism and hospitality, the HORECA industry has started to generate stable, high-volume demand in regions. For example, on June 3, 2025, Tanmiah Food Company introduced Saudi Arabia’s first fully refrigerated, 100% electric, zero-emission trucks for the distribution of fresh chicken products—marking a major advancement in their sustainability journey. These trucks, powered by Quantron technology and supported by new infrastructure, reflect their commitment to reducing environmental impact while enhancing operational efficiency.

Based on the product type, the market is segmented into red meat, poultry meat, and others. Among these, the poultry meat market dominated the market share in 2024 due to rising poultry consumption in Saudi Arabia. This steady demand helps the companies expand rapidly and provides variety to differentiate with fresh, frozen, and value-added products. The poultry industry's dominance also fosters investment in hatcheries, feed mills, and processing plants, resulting in

sustained market growth. For instance, on July 14, 2025, Tanmiah Food Company's strategic partnership with McDonald's Saudi Arabia focuses on promoting the supply of locally sourced poultry to one of the world's largest and most recognized quick-service restaurant chains, reinforcing both companies' dedication to quality and local agricultural development.

Based on form, the Saudi Arabian Meat market is segmented into fresh, frozen, and canned. Among them, the frozen are expected to grow with the highest CAGR during the forecast period (2025-2033F). The increasing urbanization, longer storage requirements, and convenience of storage and delivery drive the popularity of frozen meat. This opens up new inventory efficiencies for companies, allowing them to expand into underserved or remote areas. It also enables the local producers to compete with the imports since they can provide a uniform quality at higher prices.

Based on the distribution channel, the market is segmented into supermarkets/hypermarkets, convenience stores, online retail, butcher shops, and others. The supermarkets/hypermarkets segment dominated the market share in 2024. These systematic retail outlets boost meat sales through extensive product distribution, targeted advertising, and confidence in food control standards among customers. Companies enjoy greater volumes and brand exposure, as well as direct consumer feedback, which helps inform the development of their products. Their strength also puts pressure on suppliers who must meet high packaging, traceability, and supply chain standards.

Based on the end user, the market is segmented into household and HORECA. Among these, the HORECA segment is expected to grow with the highest CAGR during the forecast period (2025-2033F). The increasing number of hotels, restaurants, and catering businesses that are catalyzed by the tourism industry and the population rise leads to the consumption of bulk meat, primarily in prime cuts and processed form. To meat producers, the HORECA channel provides stable, high-margin contracts and promotes product novity to keep abreast of the changing culinary trends. The expansion in this segment is also in line with Vision 2030, Saudi Arabia, wherein broader economic diversification and growth of the hospitality industry are being pursued. On January 22, 2025, Siniora Foods expanded its footprint in the Saudi Arabian market with the construction of a new manufacturing facility. The company, which operates in markets such as Jordan, Palestine, Turkey, and the United Arab Emirates, confirmed the project during the Saudi HORECA 2024 exhibition in Jeddah, with an investment of approximately USD 40 million.

For a better understanding of the market adoption of the Saudi Arabian meat market, it is analyzed based on its regional presence in Saudi Arabia, including the Central Region, Western Region, Eastern Region, Southern Region, and Northern Region. The Central Region held a dominant market share in 2024. This region has a large population and numerous commercial centers, including the Central Region, centered on Riyadh, which is the largest market for meat products. Additionally, its large cityscape features a thriving retail landscape, comprising supermarkets, hypermarkets, and a variety of foodservice chains that drive the market. The premium, organic, and ready-to-cook meat is in high demand among people from high-income brackets and those with contemporary consumer orientations. The area is also appealing to giant players in food production and distribution owing to its logistics and infrastructure. Consequently, it dictates the rate of product adoption, branding, and innovation in the country's meat market.

Some major players running in the market include Al Watania Poultry, Almarai, Tanmiah Food Company, Entaj (ARASCO), Halwani Bros, Al Kabeer Frozen Foods, Saudi Radwa Food Co. Ltd. (Al Taher Group companies), NADEC, Fakieh Group, and Sunbulah Group.

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