

## Meat of bovine animals, frozen

HS Code 0202

TRADE FOCUSED PRODUCT REPORTS  
MEAT OF BOVINE ANIMALS, FROZEN  
HS CODE 0202  
JUNE 2024



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# Glossary of terms and abbreviations

## **Beef**

Beef encompasses all cuts and preparations of meat from cattle, including steak and, ground (minced) beef.

## **Carcass Weight Equivalent (CWE)**

Carcass weight equivalent is the weight of an animal after slaughter and removal of most internal organs, head, and skin. As such it is the actual weight of usable meat product.

## **Export concentration**

This index measures, for each product, the degree of export market concentration by country of origin. It tells us if a large share of commodity exports is accounted for by a few countries or, on the contrary, if exports are well distributed among many countries. The index ranges from 0 to 1, with higher values indicating more market concentration.

## **FAO (Food and Agriculture Organization of the United Nations)**

Consisting of 195 members, including 194 countries and the European Union, the Food and Agriculture Organization is a United Nations department mandated to pursue global food security. With operations worldwide, the agency supports governments in matters involving agriculture, forestry, fishing, and natural resources, particularly land and water.

## **Gulf Cooperation Council (GCC) Standardization Organization (GSO)**

Gulf Cooperation Council (GCC) member countries created the GSO as a mechanism for developing food and non-food standards. GSO food-related technical regulations and standards serve as the main point of reference for food imports into the Gulf region. Codex Alimentarius, International Organization for Standardization (ISO), the European Food Safety Agency (EFSA) and the U.S. Food and Drug Administration (FDA) serve as reference points for GSO standards and technical regulations.

## **HS (Harmonized System) codes**

A standardised number classification system for traded goods. It is used by customs officials around the world to identify products for the purpose of applying duties and taxes, as well as for statistical purposes.

## **Market concentration**

Market concentration determines the extent to which countries or firms hold market share. It is frequently used as a measure for the level of competitiveness. Measured on different scales and ranges, the general rule is the higher the score, the greater the level of competitiveness.

In respect to the Shannon Entropy scoring used by the Observatory of Economic Complexity and referenced in the report, the closer the number is to 1, the greater the concentration of just a small number of players and the lower the competitiveness. A score of about 3.81 for frozen bovine meat, HS code 0202 – as stated in this study – indicates a limited number of competing territories, with the majority of exports from 13 competing countries.

## **MFN (Most Favoured Nation) tariff**

Tariffs imposed by WTO (World Trade Organization) members on importing goods from other WTO members in the lack of a preferential trade agreement.



### **Nes (Not elsewhere specified)**

Not elsewhere specified (or indicated for NESOI) is stated for an item that is not mentioned elsewhere in a classification system.

### **NTM (Non-tariff measure)**

Import and export regulations that reflect conditions of market access other than tariffs. They include numerous regulatory requirements such as health restrictions for food quality, packaging guidelines, minimum safety standards for produced goods, etc.

### **PCI (Product Complexity Index)**

PCI ranks the breadth and sophistication of know-how required in manufacture. High PCI scores indicate that a product requires significant expertise and particular resources for its production, such as advanced machinery. Goods with a high PCI value, representing a complexity that only a few countries can undertake, include electronics and chemicals. Conversely, a low score suggests that many countries can produce the item, like basic agricultural goods or petroleum. The score's level depends on various factors.

### **Preferential tariffs**

A tariff applied to a product that is less than the MFN levy due to the existence of a preferential trade agreement. This could be a bilateral advantageous trading arrangement or a single system of favours, such as the United States GSP (generalised system of preferences).

### **Retail Weight Equivalent (RWE)**

Retail Weight Equivalent is used to refer to the weight of meat products as they are sold at the retail level, which includes not only the weight of the actual meat but also any additional elements that might be included in the packaged product, such as bones, fat, and added water.

RWE is a useful metric because it reflects the weight of the product as it is purchased and consumed by end consumers, as opposed to carcass weight (CWE), which measures the weight of an animal's carcass post-slaughter but before further processing and packaging for retail sale.

### **Self-sufficiency ratio**

The self-sufficiency ratio defines a country's ability to provide for itself and represents the percentage of consumed food that is correspondingly produced within its territory. It can be measured for a specific good, such as wheat or tomatoes, to assess a country's capacity to produce according to its needs. The formula for calculating the ratio, in terms of production and trade, is:

$\text{Production} \times 100 / (\text{Production} + \text{Imports} - \text{Exports})$ .

### **SPS**

Sanitary and phytosanitary. In reference to trade, SPS encompasses measures to sustain human, animal and plant health in addition to preventing the spread of diseases and pests.

### **Veal**

Veal refers to meat from young cattle, particularly calves, which is typically more tender and paler in colour compared to beef from older cattle.

## Product descriptions by HS 6-digit code

### **HS 020210 – Meat of bovine animals, carcasses and half-carcasses, frozen**

Frozen carcasses and half carcasses of beef or veal.

### **HS 020220 - Meat of bovine animals, cuts with bone in (excluding carcasses and half-carcasses), frozen**

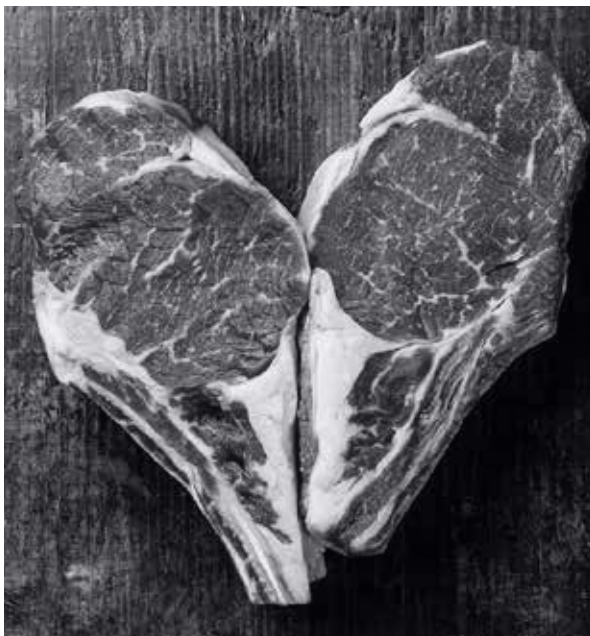
Beef or veal with bones. The reference to 'bone-in' means that the meat contains bones.

### **HS 020230 - Meat of bovine animals, boneless cuts, frozen**

Beef or veal with bones removed. The reference to 'boneless' means that the meat does not contain bones.



## Explanatory note



During the course of undertaking this study for frozen bovine meat, research and reporting has included a slightly broader scope to include 'beef', or 'frozen meat', rather than specifically the 'frozen beef and veal' related to HS 0202. One reason being limited availability of category-specific data.

In respect to Jordan trade data, there were significant discrepancies identified with category exports and imports, when using the key trade statistics database employed in research, namely the ITC Trade Map platform, which in turn accesses UNCTAD and WTO data. Fundamentally, here, Jordan's export data appears incorrect, a point seconded by industry insiders and reported to Jordan's Chamber of Industry and Department of Statistics. It is for this reason that when it comes to assessing Jordan's exports in frozen bovine meat (HS 0202), import data reported by partner countries has been employed to approximate and estimate the Kingdom's trade.



## Executive summary

The frozen bovine meat industry, categorised under HS code 0202, continues to grow annually. This growth is particularly driven by shifting consumer preferences towards convenience foods and longer shelf lives.

In 2022, total frozen bovine meat output was recorded at 59.1 million tons. The United States, producing about one-fifth of the global output at 12.2 million tons, is the world's largest producer in the HS 0202 category. It was also the second-largest exporter in this group in 2022, generating revenues of \$5.8 billion. Brazil topped the list as the world's largest exporter of frozen beef in 2022, with revenues of \$10.9 billion. The most traded product within the category is frozen, boneless bovine meat (HS020230), accounting for 91% of all HS 0202 exports and valued at \$35.5 billion.

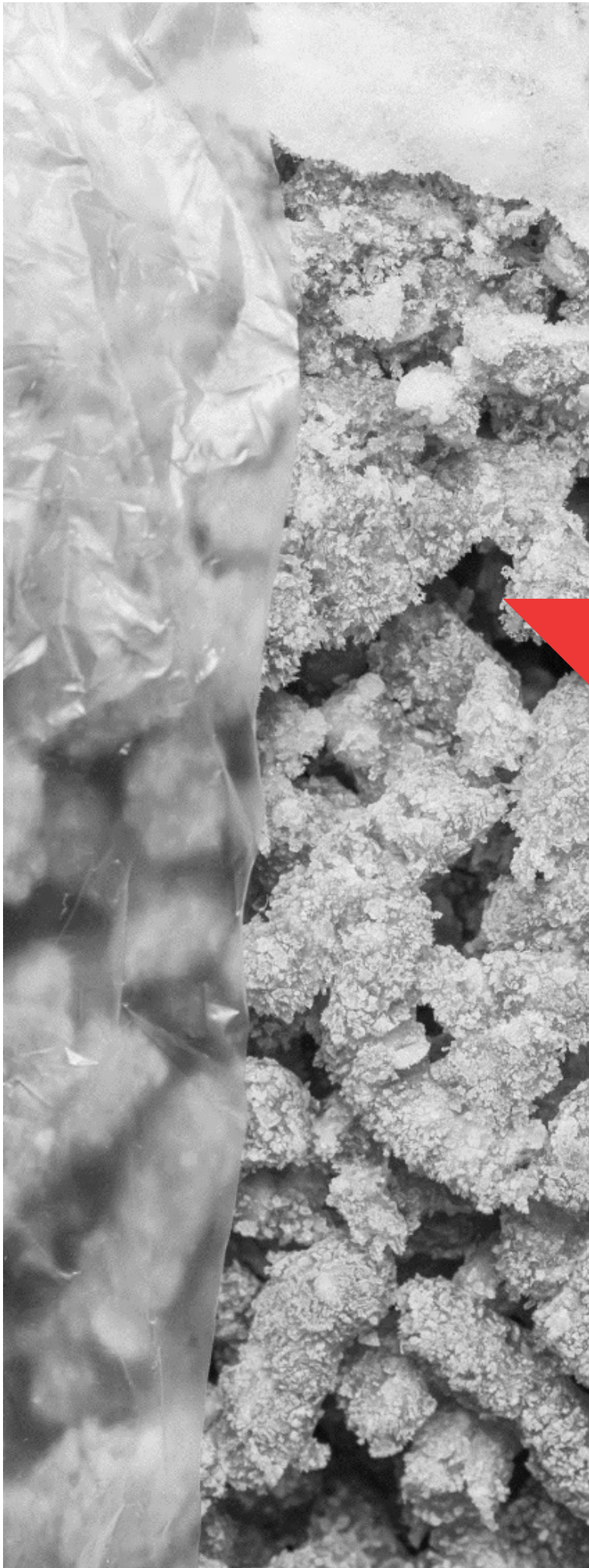
Trade revenue in the HS 0202 category increased by 58% from 2018 to 2022. The world's top seven exporters – Brazil, the United States, Australia, India, New Zealand, Argentina, and Uruguay – together achieved \$31.7 billion. This figure represents approximately 82% of the total global export value in this category.

The top seven importers globally are China, the United States, South Korea, Japan, Egypt, Taiwan, and Indonesia, accounting for 70% of global import trade by value.

Jordan's export values in this category were estimated at approximately \$25.5 million in 2022, reflecting a world share of approximately 0.06% in HS 0202. The country experienced significant export growth of 130% from 2018 to 2022, primarily to markets such as Saudi Arabia, the United Arab Emirates (UAE), Qatar, and Kuwait.

Regarding the priority markets in this study, namely Saudi Arabia, the United Arab Emirates, and Indonesia, Jordan's exports gained significant momentum in the Gulf States between 2018 and 2022, but entry into Indonesia is yet to be seen. Each of these countries presents considerable potential due to their sizeable Muslim populations requiring Halal certification for meat products. Jordanian producers are already compliant with standards in Saudi Arabia and the Emirates. Both Gulf states have dynamic, fast-growing economies with high per capita beef consumption and, in the case of the UAE, a vibrant hospitality sector boosting beef consumption. Indonesia, despite having a lower per capita beef consumption than the global average, has a large population of 240 million, with nine-tenths being Muslim, representing potential as a gateway to East Asian markets.

There is an emerging trend towards traceability, sustainability, and organic produce. This presents an opportunity for Jordanian producers to diversify into premium markets that may accept higher-priced meats in exchange for assurances of high-quality production and transparency.



## **Product overview**



# Meat of bovine animals, frozen

## Production and consumption

Spurred by rising prices, global bovine production, namely beef and veal, is forecast to rise by 1% between 2019 and 2023, increasing from 58.5 million tons (carcass weight equivalent) to 59.1 million tons.

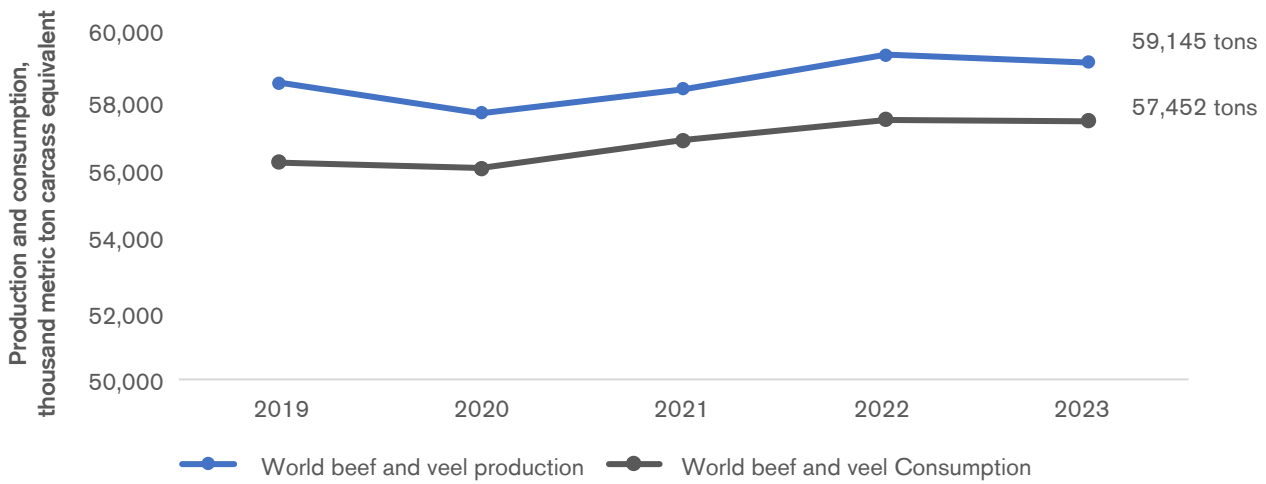


Chart 1 World beef and veal production and consumption, 2019 to 2023

The United States, estimated to be the world leader in bovine meat production with 12.2 million tons in 2023, is expected to see a 3% decline in output.<sup>1</sup> Brazil is projected to increase its production by 2%, while China, the second largest global consumer and third-largest producer, is forecast to expand its output by 3%. Indian production, driven by export demand and a slight rise in domestic consumption, is anticipated to gain 2%.<sup>2</sup> Production in Australia is expected to grow by 10%.

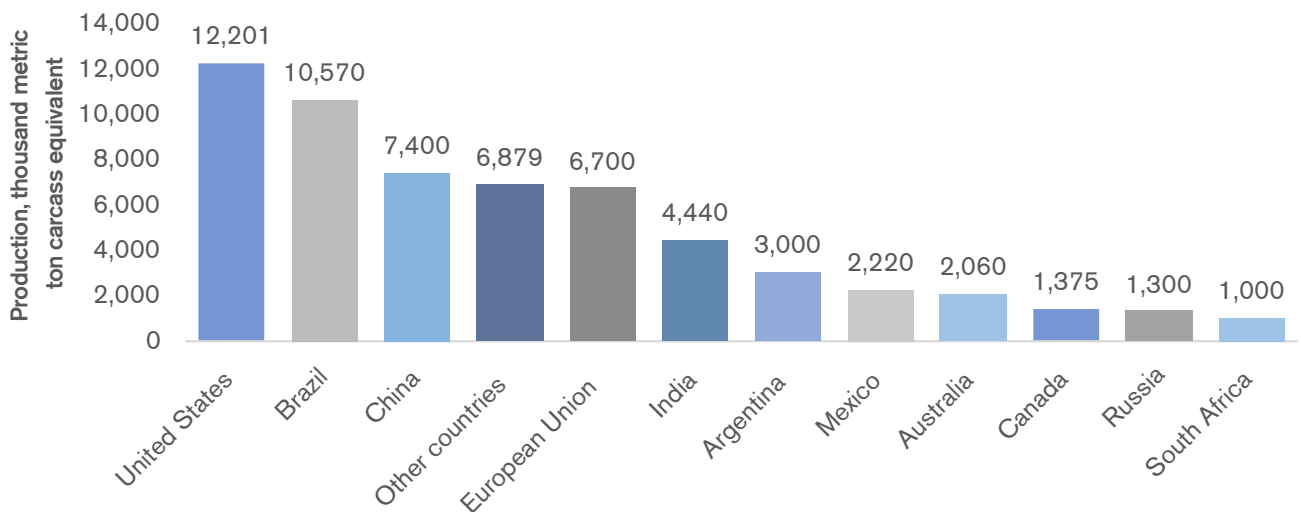


Chart 2 Beef and veal production by territory, 2023 estimates <sup>3</sup>

<sup>1</sup> (United States Department of Agriculture, Foreign Agricultural Service; Livestock and Poultry: World Markets and Trade, 2023)

<sup>2</sup> Ibid.

<sup>3</sup> Ibid.



Between 2019 and 2023, world consumption experienced a 2.1% increase, growing from 56.3 million tons carcass weight equivalent to 57.5 million tons. Beef and veal consumption in 2023 is expected to be highest in the United States, followed by China and Brazil. Global per capita consumption has remained around six kilograms per capita (RWE) for the past decade and is anticipated to stay stable.

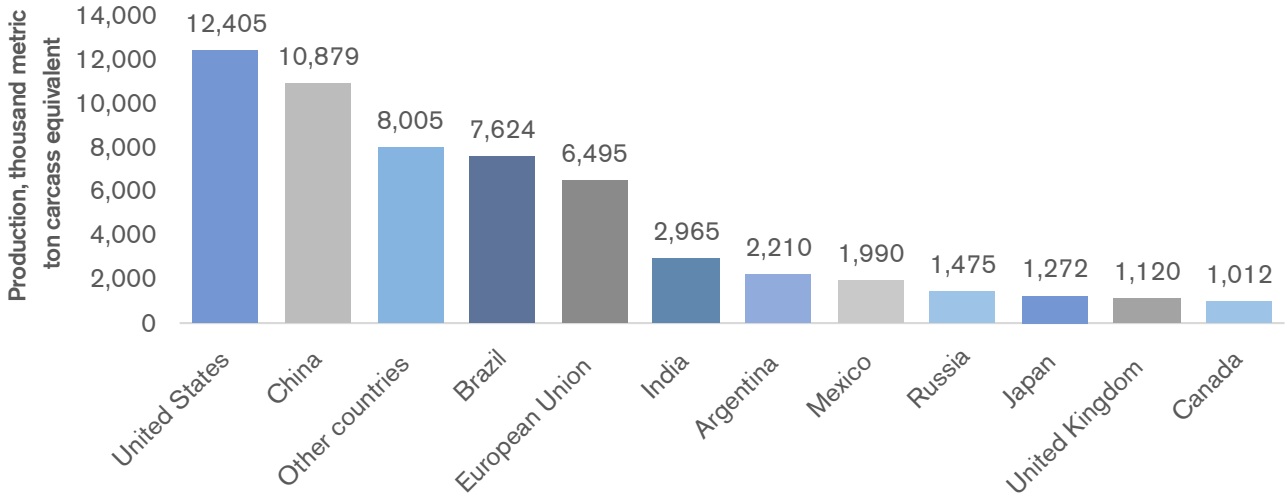


Chart 3 Beef and veal consumption by territory, 2023 estimates <sup>4</sup>

### Exports and imports

In 2022, the total value of global frozen bovine meat (HS 0202) exports reached \$38.7 billion. In contrast, fresh or chilled bovine meat (HS 0201) exports achieved \$29.5 billion in 2022.<sup>5</sup> This suggests that the total trade of frozen and fresh bovine meat combined amounted to \$68.2 billion in 2022, with frozen products accounting for 57% of bovine meat exports.

Brazil emerged as the largest frozen bovine meat exporter, with shipments valued at just under \$11 billion, accounting for 28% of the global export trade. The top 10 beef-exporting countries together represented an overwhelming \$33.9 billion, or 88% of the total export trade in frozen beef and veal.

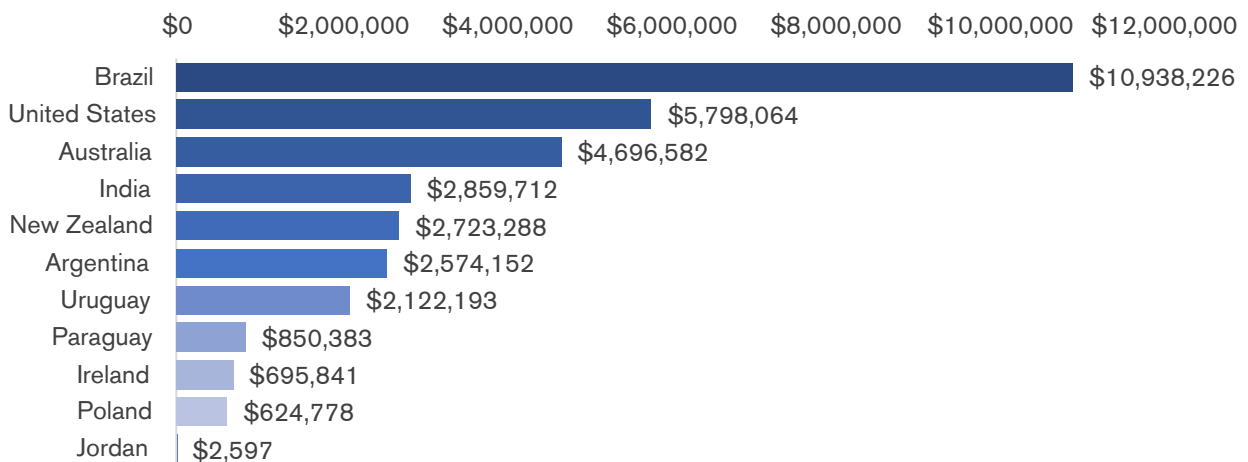


Chart 4 Frozen bovine meat exporters by value in 2022

<sup>4</sup> (United States Department of Agriculture, Foreign Agricultural Service; Livestock and Poultry: World Markets and Trade, 2023)  
<sup>5</sup> (ITC Trade Map, List of exporters for the selected product, Product: 0201 Meat of bovine animals, fresh or chilled, 2023)



China is the world's largest importer of frozen bovine meat, representing over 43% of the global trade value, with imports worth \$17.1 billion. This marks a substantial increase of 35% in value since 2018. Concurrently, the global value of beef exports rose by 13%. In 2022, China's imports of frozen beef reached 2.6 million tons, evidencing a 6% increase in quantity from 2018. In contrast, the global quantity of exported beef rose by just 2% over the same timeframe. The United States and the Republic of Korea follow China in the global import rankings, with 7.7% and 7.3% of global imports, respectively. Jordan's neighbouring countries, Egypt, and Israel are also significant buyers of frozen bovine meat.

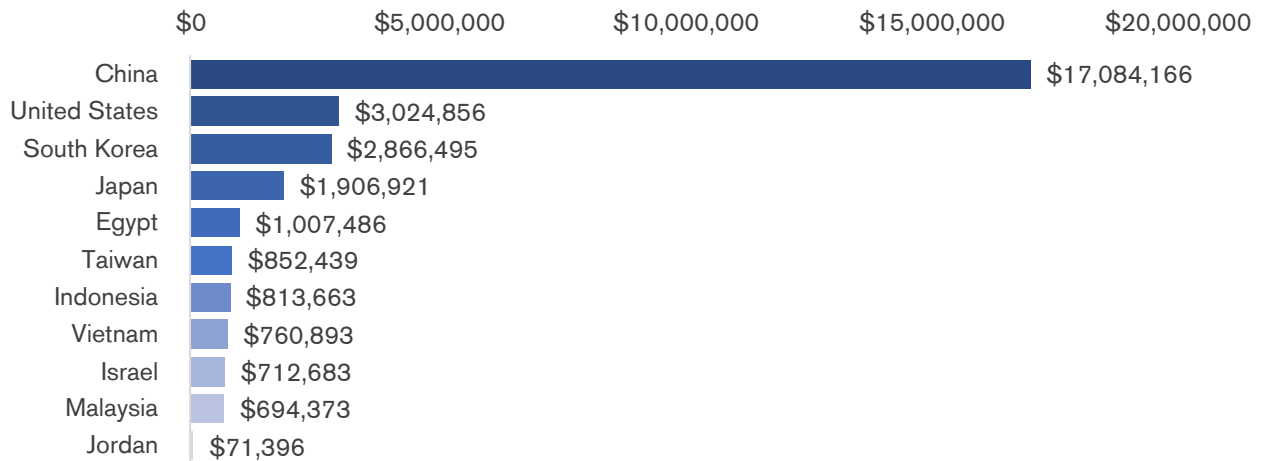


Chart 5 Top frozen bovine meat importers by value in 2022



## **Market dynamics**



# Demand and supply trends

## **Quality, traceability and the rising popularity of meats from sustainable production**

Consumers are increasingly concerned about the quality and safety of their food, which has led to a demand for higher-quality frozen beef products with clear transparency in sourcing and processing. Similarly, the interest in sustainable and ethically sourced beef, such as those certified as organic, is growing. This trend is driven by concerns about responsible sourcing and environmental sustainability.<sup>6</sup>

## **High protein alternatives to meat are gaining in popularity**

The rise of plant-based meat alternatives has impacted the meat industry. Some consumers are opting for plant-based options over traditional beef products due to health concerns, environmental considerations, and animal welfare reasons.<sup>7</sup>

## **Busy lifestyles drive convenience**

Busy lifestyles have led to an increased demand for convenient food options, including frozen beef products such as burgers, meatballs, and pre-marinated meats. Consumers are seeking easy-to-prepare meals. Consequently, a trend towards online ordering and delivery services in the food industry is emerging.<sup>8</sup>

## **High prices are expected to subdue consumers' appetite for beef**

Global beef prices have been rising due to high input costs, increased demand from the reviving hospitality sector, and tighter supply among major producers. Beef prices are expected to remain high in the short to medium term. As the cost of living rises sharply worldwide, impacting household purchasing power, consumers in some regions are likely to reduce their consumption of more expensive beef in favour of cheaper protein alternatives.

## **Asia is driving demand for beef**

While some regions are projected to reduce their beef consumption, this trend is not expected in the Asia-Pacific region, where per capita beef consumption is anticipated to grow at a rate of 0.4 kilograms annually. Specifically, in China, per person beef consumption is expected to increase by 0.8 kilograms per year by 2032.<sup>9</sup>

## **E-commerce is a growing channel for access to markets**

The growth of e-commerce has significantly influenced the demand for frozen beef. Consumers are increasingly ordering frozen beef products online, creating new opportunities for online retailers and delivery services.

## **Concern with the environmental impact of beef production**

The environmental effects of beef production, a significant source of greenhouse gases, remain a major concern. Additionally, the industry contributes to deforestation due to grazing and feed production. These factors have led some consumers to reduce their beef consumption in favor of less environmentally impactful options like poultry.

## **Beef production to grow at a gradual rate**

World beef production is projected to increase over the long term, driven by demand for protein. It is expected that growth will be gradual as the consumption of poultry rises because of its affordability, benefits with respect to diet, and the negative impact of cattle farming on the environment.<sup>10</sup>

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<sup>6</sup> Ibid.

<sup>7</sup> (NielsenIQ, Meat Department Trends: What's New for 2023, 2023)

<sup>8</sup> Ibid.

<sup>9</sup> (OECD and Food and Agriculture Organization of the United Nations, 2023)

<sup>10</sup> (Euromonitor International, Global Market Overview of Beef, 2022)



### More efficient and sustainable production

Production methods in beef rearing are advancing with the aim of reducing its environmental footprint, improving animal welfare, and enhancing supply chain efficiency. Growing concerns about the environmental impact of beef production, particularly related to methane emissions from cattle, have spurred research and initiatives aimed at mitigating the industry's contribution to climate change.<sup>11</sup>

### Extended shelf life and seasonality

The long shelf life, ability to overcome seasonal availability issues, and convenience in cooking are key factors driving the market growth of frozen beef. The freezing process not only enhances inventory management but also contributes to food security, making frozen beef a versatile food source.<sup>12</sup>



## Market concentration and product complexity

**Market concentration.** A Shannon Entropy value of 3.81 in 2021 indicates that the exports of frozen bovine meat (HS 0202) were predominantly controlled by a relatively small group of 13 countries. This suggests a certain level of concentration in the market.<sup>13</sup>

**Product complexity score.** The score of -1.25 for frozen bovine meat in 2021, ranking it 894 out of 1024 in the HS 4 classifications, indicates that it is relatively low in product complexity. This is further supported by the specific scores for bone-in bovine cuts (HS 020220) and boneless bovine cuts (HS 020230), which are also low in product complexity.

Based on 2021 trade statistics, frozen bone-in bovine cuts (HS 020220) scored -1.16 and frozen boneless bovine cuts (HS 020230) scored -1.41. Both are minimal in product complexity terms.

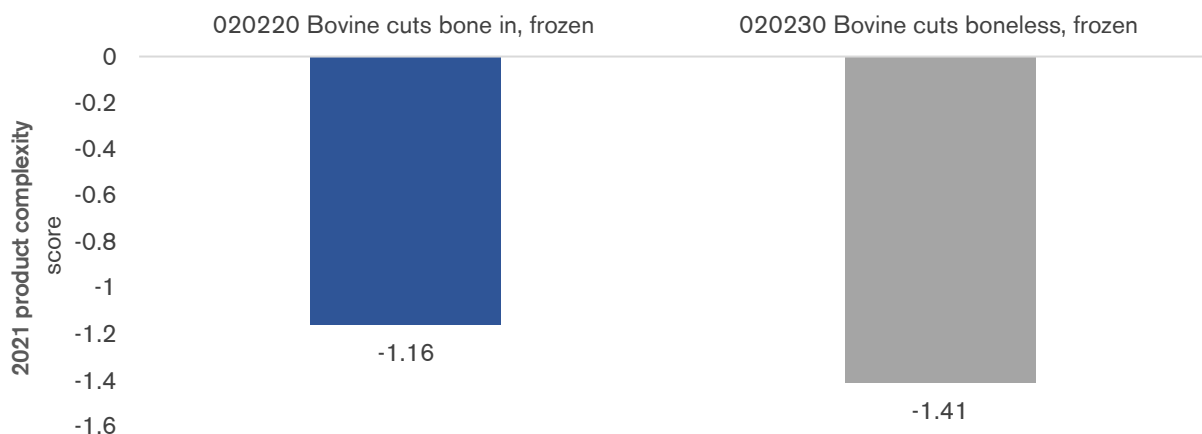


Chart 6 Frozen bovine meat complexity on the HS6 level in 2021

<sup>11</sup> Ibid.

<sup>12</sup> (Market Data Forecast, Frozen Meat Market, 2023)

<sup>13</sup> (Observatory of Economic Complexity, Frozen Bovine Meat, 2023)



Regarding historical progress in the Product Complexity Index (PCI), frozen bone-in bovine cuts (HS 020220) maintained a consistent score of -1.16 from 2012 to 2021. Meanwhile, frozen boneless bovine cuts (HS 020230) showed a slight increase in manufacturing sophistication, improving from a score of -1.54 in 2012 to -1.41 in 2021. Comparatively, except for fresh or chilled boneless beef, other fresh beef cuts maintain significantly higher complexity scores.<sup>14</sup>

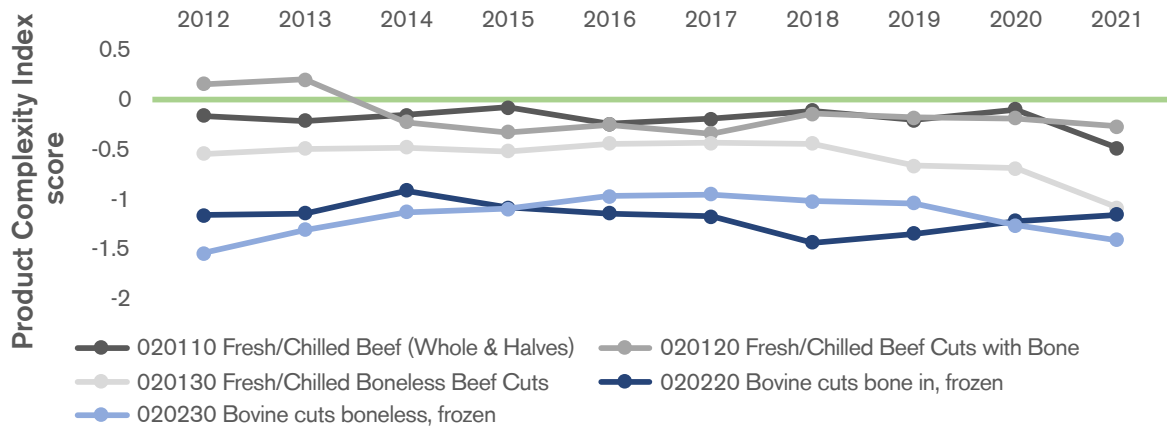


Chart 7 Frozen bovine meat product complexity 2012 to 2021



## World trade export statistics by frozen bovine meat category

Between 2018 and 2022, the value of exports in frozen bovine meat (HS 0202) increased by 7%.<sup>15</sup> In 2022, global imports of frozen bovine meat amounted to \$39 billion. Of this, frozen, boneless meat of bovine animals (HS 020230) accounted for 91.6% of the exports, while frozen bovine cuts with bone in represented 8.1%.<sup>16</sup> China holds the position as the world's leading importer of frozen, boneless meat of bovine animals (HS 020230), comprising about 40% of the global trade.

HS Code	2022 world exports	2022 top export value and territory	2022 top import value and territory
<b>HS 020210</b> Frozen bovine carcasses and half-carcasses	\$117.5 million	\$23.1 million Poland	\$51.3 million Saudi Arabia
<b>HS 020220</b> Frozen bovine cuts, with bone in	\$3.2 billion	\$1.2 billion United States	\$1.5 billion China
<b>HS 020230</b> Frozen, boneless meat of bovine animals	\$35.5 billion	\$10.9 billion Brazil	\$15.6 billion China

Table 1 Frozen bovine meat export and import and Jordan export market share

<sup>14</sup> (Observatory of Economic Complexity, Product Rankings, n.d.)

<sup>15</sup> (ITC Trade Map, List of products at 6 digits level exported in 2022 detailed products in the following category: 0202 Meat of bovine animals, frozen, 2023)

<sup>16</sup> Ibid.



## HS 0202 in the context of Jordanian exports

Jordan's top HS 0202 markets are regional

The Kingdom's total export value came to approximately \$25.5 million, founded upon on estimates. The main markets include Saudi Arabia, the United Arab Emirates, Qatar and Kuwait, all of which define growth for Jordan's export yet also reflect a high reliance on what is less than a handful of regional countries.

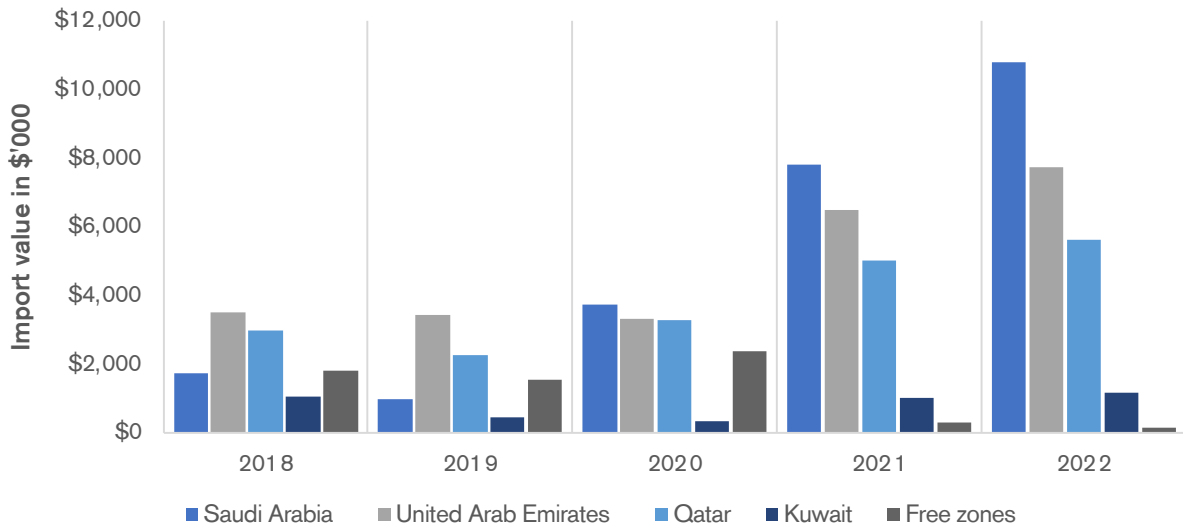
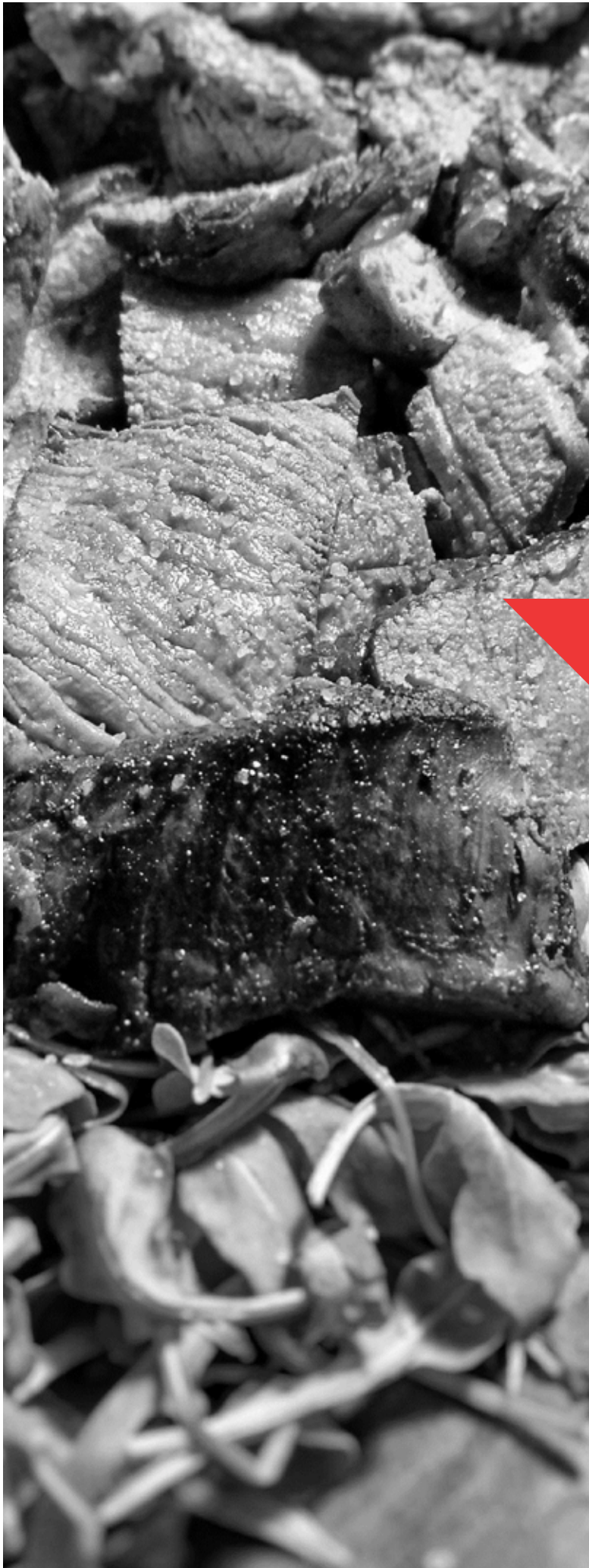


Chart 8 Frozen bovine meat markets to which Jordan exported in 2018 to 2022



## Major global suppliers

- Cargill, Inc. Cargill is an American multinational company involved in various aspects of the food industry, including beef processing and distribution. **Website:** <https://www.cargill.com/>
- JBS S.A. JBS is a Brazilian multinational company and one of the world's largest beef producers and exporters. They have a significant presence in both fresh and frozen beef products. **Website:** <https://jbs.com.br/>
- Marfrig Global Foods. Marfrig is a Brazilian beef producer and processor with a global presence, offering frozen beef products. **Website:** <https://marfrigfoods.com/>
- Minerva Foods. Minerva is a Brazilian company and a major player in the beef industry, exporting frozen beef products worldwide. **Website:** <https://minervafoods.com/>
- National Beef Packing Company, LLC. National Beef is one of the largest beef processors in the United States, specialising in beef processing and distribution. **Website:** <https://www.nationalbeef.com/>
- Tyson Foods, Inc. Tyson Foods is an American multinational corporation producing a wide range of protein-based products, including frozen beef. **Website:** <https://www.tysonfoods.com/>
- Vion Food Group. Vion, a Dutch company, is a significant player in the European beef market and offers frozen beef products. **Website:** <https://www.vionfoodgroup.com/>



## **Priority markets**



# Indonesia

## Indonesia macroeconomic overview

In 2022, Indonesia's economy demonstrated resilient and robust performance with a 5.3% growth, bolstered by strong export performance and buoyant domestic and post-pandemic demand. However, economic growth in 2023 is forecast to decrease to 4.9%. This anticipated decline is attributed to the normalisation of demand, lower oil prices, improved domestic harvests, government actions supporting supply chains, including those in food and agriculture, and enhanced terms of trade resulting from a stronger currency.<sup>17</sup>

## Indonesia frozen bovine meat consumption

Per capita consumption of beef in Indonesia is considerably lower than the world average, estimated at 2.12 kilograms per annum in 2023.<sup>18</sup> However, trends indicate steady growth, driven by changing dietary preferences and the need for convenience.

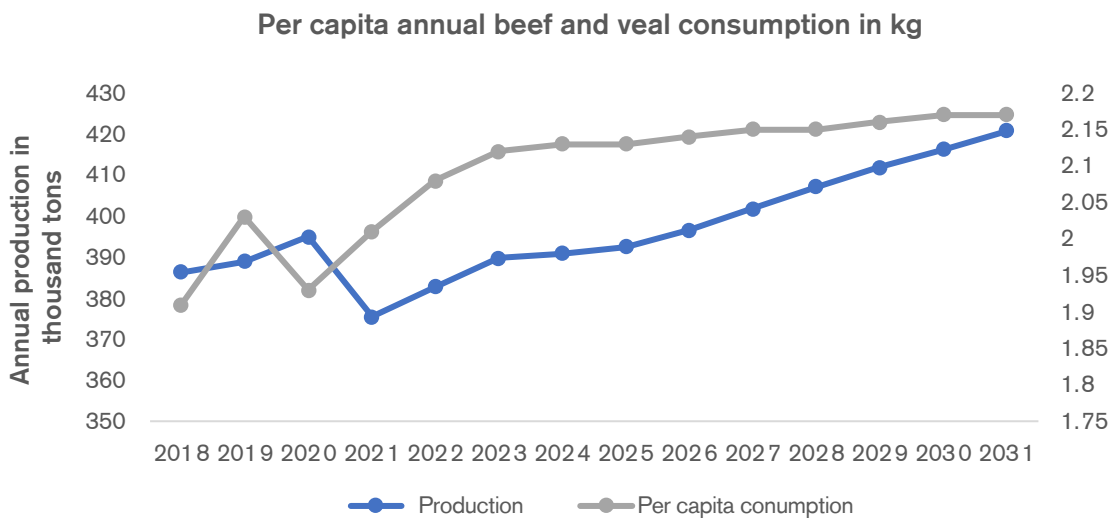


Chart 9 Indonesia per capita beef and veal production and consumption, 2018 to 2031

Frozen beef, as part of the broader frozen meat market, is gaining popularity due to convenience, longer shelf life, and food safety assurance. The market benefits from improved cold chain infrastructure and a growing preference within the food service sector.

Challenges faced by the frozen beef market include food safety and quality assurance, limited infrastructure for cold storage and distribution, and competition with consumer preferences for fresh meat. Despite these challenges, the market has grown, particularly as consumer behaviour shifted towards convenient and longer-lasting food options during the pandemic.

<sup>17</sup> (The World Bank, Indonesia Growth Seen Moderating in 2023 as Pandemic Rebound Fades, 2023)

<sup>18</sup> (OECD-FAO Agricultural Outlook, 2022)



### Indonesia trade in frozen bovine meat

In 2022, Indonesia's frozen bovine meat imports were valued at \$813.7 million, representing a growth of 44% between 2018 and 2022, making it the world's seventh-largest importer in 2022. India emerged as the largest supplier with trade totaling \$321 million, followed by Australia and the United States.

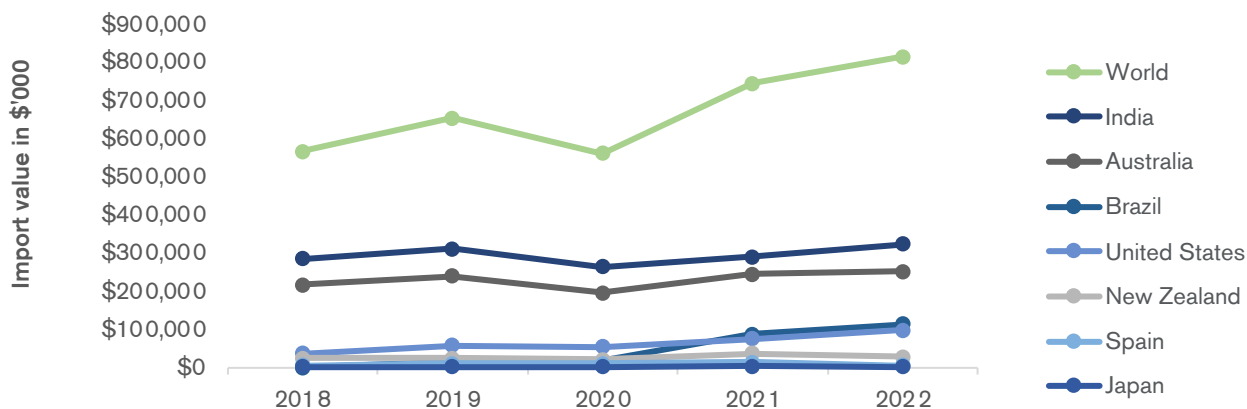


Chart 10 Indonesia frozen bovine meat, main supplying countries, 2018 to 2022

The greatest proportion, 90%, of trade was under frozen, boneless meat of bovine animals (HS 020230). The remaining 10% was for frozen bovine cuts, with bone in (HS 020220). Indonesia is a net importer of frozen bovine meat. Exports in the category during 2022 were negligible.<sup>19</sup>

### Indonesia frozen bovine Import values

In 2022, the average imported price for frozen bovine meat (HS 0202) was \$3,660 per ton. In terms of main import categories, the average import value for frozen, boneless meat of bovine animals (HS 020230) was \$3,903 per ton, while it stood at \$2,312 per ton for frozen bone-in bovine cuts (HS 020220). Both categories exhibited slight price increases since 2018. Notably, there is only evidence of imports for frozen bovine carcasses and half-carcasses (HS 020210) in 2019.<sup>20 21 22</sup>

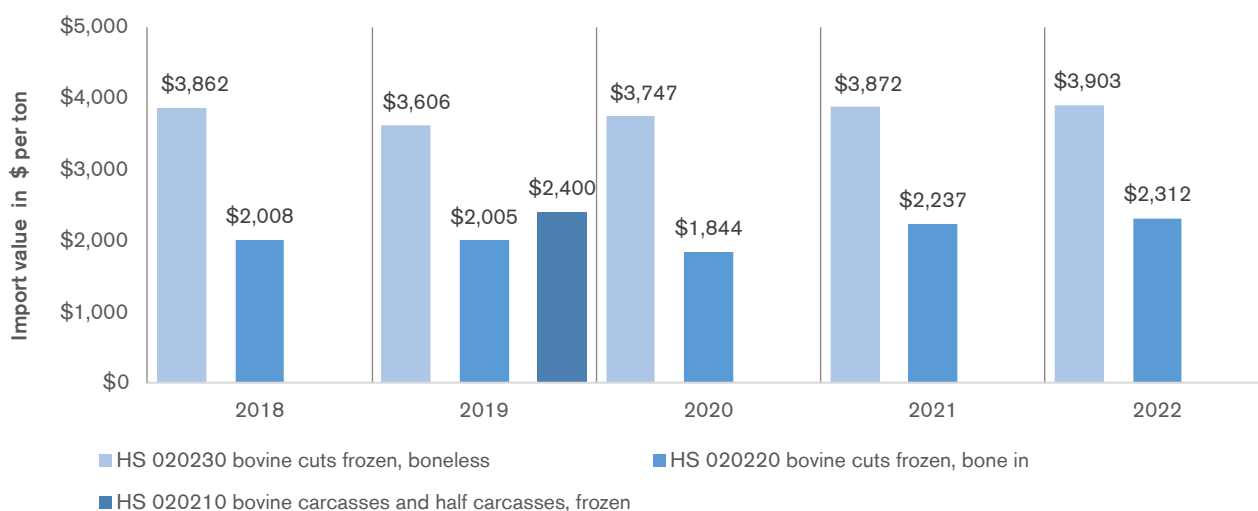


Chart 11 Indonesia frozen bovine meat imports in \$ per ton

<sup>19</sup> (ITC Trade Map, List of products at 6 digits level imported by Indonesia in 2022, detailed products in the following category: 0202 Meat of bovine animals, frozen, 2023)

<sup>20</sup> (ITC Trade Map, List of importers for the selected product, Product: 020210 Frozen bovine carcasses and half-carcasses, 2023)

<sup>21</sup> (ITC Trade Map, List of importers for the selected product, Product: 020220 Frozen bovine cuts, with bone in (excl. carcasses and half-carcasses), 2023)

<sup>22</sup> (ITC Trade Map, List of importers for the selected product, Product: 020230 Frozen, boneless meat of bovine animals, 2023)



### **Indonesia trade in frozen bovine meat from Jordan**

Between 2018 and 2022, trade in frozen bovine meat between Indonesia and Jordan was not evident.

### **Indonesia's trade agreements with Jordan**

There are no specific bilateral trade agreements between Indonesia and Jordan. However, a memorandum of understanding was signed between the two countries in September 2023 to strengthen bilateral relations. A significant objective here constitutes forging stronger business relations in an agreement that covers political, legal, economic, technical, social and cultural domains.<sup>23</sup>

## **Indonesia PESTEL analysis**

### **Politics**

Indonesia, a member of ASEAN, enjoys a stable political environment, though the decentralisation of political power to its regions and provinces impacts policy implementation and regional development. Indonesia and Jordan share similar perspectives on international issues, particularly those concerning the Islamic world. They often support each other's positions in global forums such as the United Nations and the Organisation of Islamic Cooperation (OIC).

### **Economics**

The Indonesian economy grew 5.3% in 2022, supported by commodity-related exports and a recovery in private consumption.

There is a gap in supply and demand for beef. Indonesia was the world's seventh-largest frozen bovine meat importer in 2022, accounting for \$814 million.

### **Social**

At approximately 240 million people, Indonesia is home to the world's largest Muslim population, accounting for about 87% of the country's citizens. Halal certification is accordingly critical.

Beef consumption in Indonesia is lower than the world average at 2 kg per capita yearly. However, estimates show an upward trend, responding to higher household incomes, demand for convenience and the availability of online channels. Reduced dining out and increased home cooking, were outcomes of Covid-19, leading to increased demand for frozen meats.

### **Technology**

Challenges exist with limited cold storage and distribution infrastructure, and correspondingly food safety and quality assurance. As a result, there is investment in cold chain infrastructure. Moreover, e-commerce has evolved in response to the changing habits of Indonesian consumers, who are becoming more digitally oriented.

### **Environment**

Indonesia is exposed to several environmental concerns. For example, deforestation and land degradation have placed the country as a major greenhouse gas emitter. Regarding local beef production, advisory notes have referred to the need for sustainable farming systems.<sup>24</sup>

### **Legal**

The HS 020230 import tariff for Jordan is 5%. Free trade agreements do not exist between the countries.

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<sup>23</sup> (Ministry of Foreign Affairs of the Republic of Indonesia, Indonesia and Jordan Strengthen Bilateral Relations, 2023)

<sup>24</sup> (Ali Agus, 2018)



## Indonesia frozen bovine meat distributors

- Foz Meat Indonesia. Located in Batam, a northern Indonesian island, Foz Meat Indonesia is a frozen meats supplier. **Website:** <https://foz-meat-indonesia.business.site/>
- Heimon Food Semarang. Based in Semarang, Central Java, Heimon Food Semarang distributes meats. **Social media site:** <https://www.facebook.com/heimon.food/>
- Indogal. Headquartered in Jakarta, Indogal is a beef importer and distributor specialising in raw and processed frozen beef. **Website:** <https://www.indogal.id/>
- PT. Global Pratama Wijaya. Catering to Indonesia's premium markets, PT. Global Pratama Wijaya is a distributor of high-quality meats from Japan and Australia. **Website:** <https://globalpratamawijaya.com/>
- PT. Prima Sari Jaya. Based in Batam, a northern Indonesian island, Prima Sari Jaya is a frozen foods distributor. **Website:** <http://www.primasarijaya.com/>
- Puri Pangan Utama. Located in Bali, Puri Pangan Utama is a distributor of frozen, chilled, and dry foods. **Website:** <https://puripangan.co.id/>
- Sentosa Utama. Located in Jakarta, Sentosa Utama is a frozen meat supplier. **Website:** <https://sentosa-utama.business.site/>
- Subur Arta Utama PT. Headquartered in Jakarta, Subur Arta Utama is a meat importer. **Website:** <http://sauindo.com/>

## Exhibitions and trade fairs in Indonesia\*

Dates	Exhibition name	City	Country	Website
TBC, 2025	Indonesia International Food Expo 2025	Surabaya	Indonesia	<a href="https://eastfoodindonesia.com/">https://eastfoodindonesia.com/</a>

\* TBC is the acronym for 'to be confirmed.' At the time of reporting, specific dates had not been published for 2025 trade shows.



# Saudi Arabia

## Saudi Arabia macroeconomic overview

Saudi Arabia, pursuing Vision 2030 reforms, was the fastest-growing G20 economy in 2022, with a rise of 8.7%. This was driven by increases in oil production and growth in the non-oil GDP. This growth was prompted by private consumption and non-oil private investments, including large-scale infrastructure projects. As a result, the country is advancing economically, marked by record-low unemployment rates and limited inflation.<sup>25</sup>



## Saudi Arabia frozen bovine meat consumption

Per capita beef consumption in Saudi Arabia, which is forecasted to exceed production until 2029, is considerably higher than the world average of six kilograms per annum. It is estimated at 225 kilograms per annum in 2023.

Trends indicate a gradual increase to 249 kilograms per person per year by 2031.<sup>26</sup> Consumption of frozen beef in Saudi Arabia has shown positive growth over recent years, supported by a growing preference for meat as a protein source and changing consumer habits towards convenience.

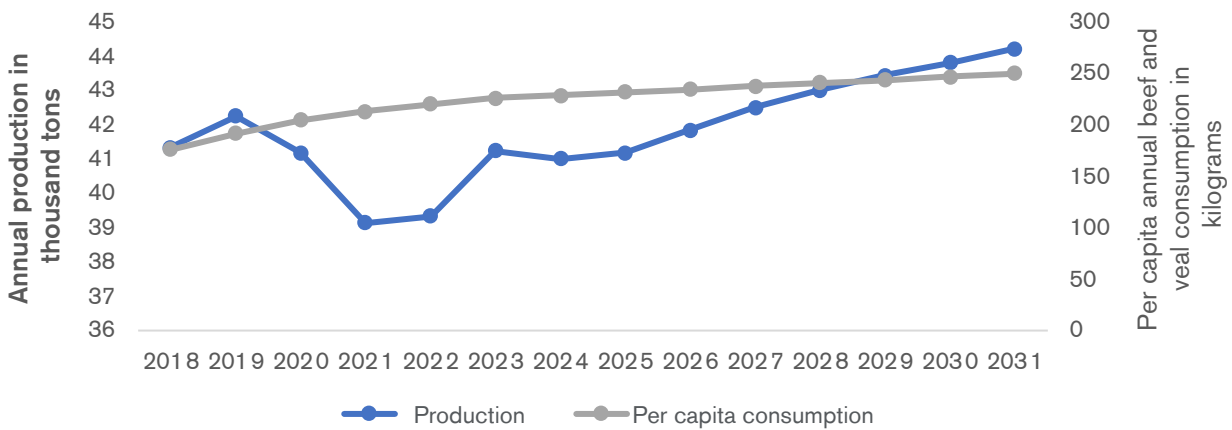


Chart 12 Saudi Arabia beef and veal production and consumption, 2018 to 2031

Per capita consumption of meat in Saudi Arabia is expected to surpass both global and regional levels, indicating a robust demand within the country, where there is a preference for beef among consumers. Beef – which is significant amongst frozen meats – is predicted to become the fastest-growing meat, with a CAGR of 2.94% during the period from 2022 to 2028.<sup>27</sup>

<sup>25</sup> (International Monetary Fund (IMF), Saudi Arabia: Staff Concluding Statement of the 2023 Article IV Mission, 2023)

<sup>26</sup> (OECD-FAO Agricultural Outlook, 2022)

<sup>27</sup> (GlobalData, Saudi Arabia Meat Market Size and Trend Analysis by Categories and Segment, Distribution Channel, Packaging Formats, Market Share, Demographics and Forecast, 2021-2026, 2022)



### Saudi Arabia beef imports

Saudi Arabia's frozen beef imports registered an increase of 70% from 2018 to 2022, achieving a value of \$460 million in 2022. The largest suppliers were India, Brazil, and Australia, followed by Russia, the United States, Canada, Jordan, and New Zealand.

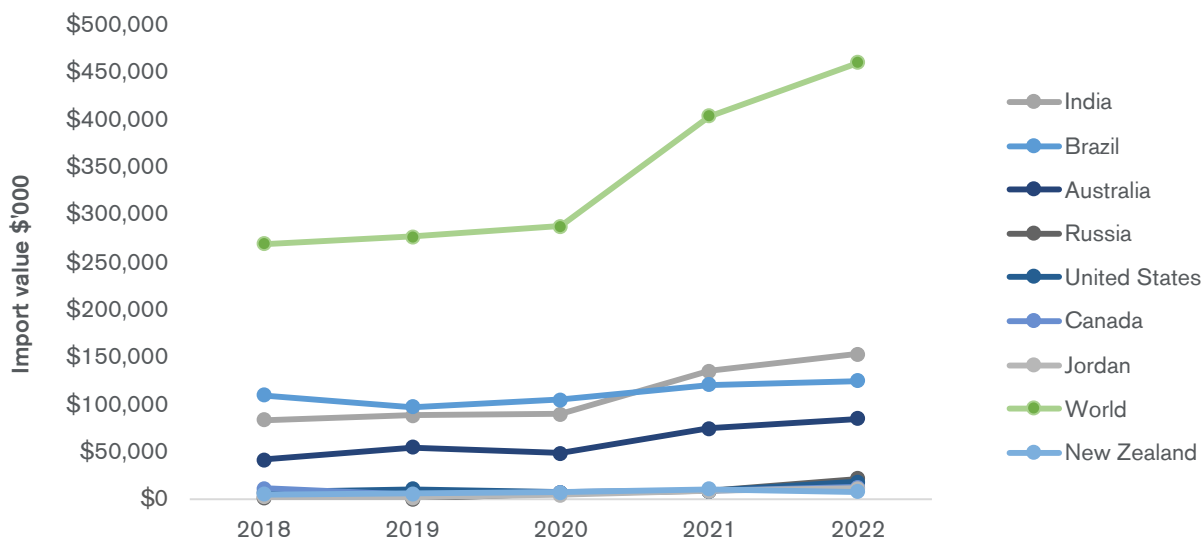


Chart 13 Saudi Arabia frozen bovine meat, main supplying countries, 2018 to 2022

In 2022, Saudi Arabia was the world's sixteenth-largest importer of frozen bovine meat, with imports valued at \$460 million. Of this trade, 70% was categorised under frozen, boneless meat of bovine animals (HS 020230). Frozen bovine cuts with bone in (HS 020220) accounted for 19%, and frozen bovine carcasses and half-carcasses (HS 020210) comprised 11%.<sup>28</sup> Saudi Arabia is a net importer of frozen bovine meat, with category exports amounting to \$25.7 million in 2022, exclusively under frozen, boneless meat of bovine animals (HS 020230).<sup>29</sup>

### Saudi Arabia trade in frozen bovine meat

In 2022, the average imported price for frozen bovine meat (HS 0202) in Saudi Arabia was \$4,708 per ton. For frozen, boneless meat of bovine animals (HS 020230), the average import value was \$4,973 per ton, compared to \$4,388 per ton for frozen bone-in bovine cuts (HS 020220). Since 2018, prices for frozen, boneless meat have increased, while prices for frozen bone-in cuts, as well as for frozen bovine carcasses and half-carcasses, have decreased.<sup>30 31 32</sup>

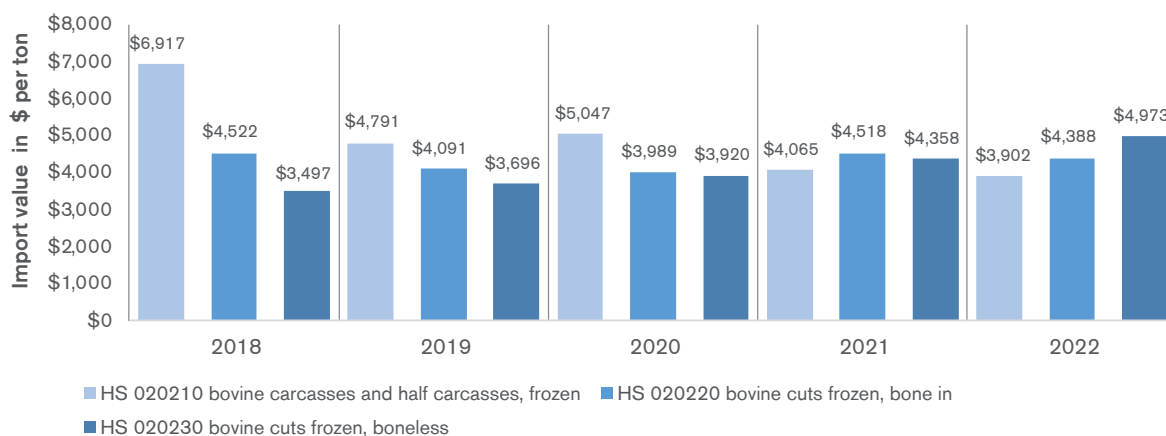


Chart 14 Saudi Arabia frozen bovine meat imports in \$ per ton

<sup>28</sup> (ITC Trade Map, List of products at 6 digits level imported by Saudi Arabia in 2022 detailed products in the following category: 0202 Meat of bovine animals, frozen, 2023)

<sup>29</sup> (ITC Trade Map, List of products at 6 digits level exported by Saudi Arabia in 2022 detailed products in the following category: 0202 Meat of bovine animals, frozen, 2023)

<sup>30</sup> (ITC Trade Map, List of importers for the selected product, Product: 020210 Frozen bovine carcasses and half-carcasses, 2023)

<sup>31</sup> (ITC Trade Map, List of importers for the selected product, Product: 020220 Frozen bovine cuts, with bone in (excl. carcasses and half-carcasses), 2023)

<sup>32</sup> (ITC Trade Map, List of importers for the selected product, Product: 020230 Frozen, boneless meat of bovine animals, 2023)



### Saudi Arabia trade in frozen bovine meat from Jordan

Jordan's exports of frozen, boneless meat of bovine animals (HS 020230) to Saudi Arabia rose impressively from \$3.7 million in 2020 to \$10.8 million in 2022, marking a 190% growth.<sup>33</sup>

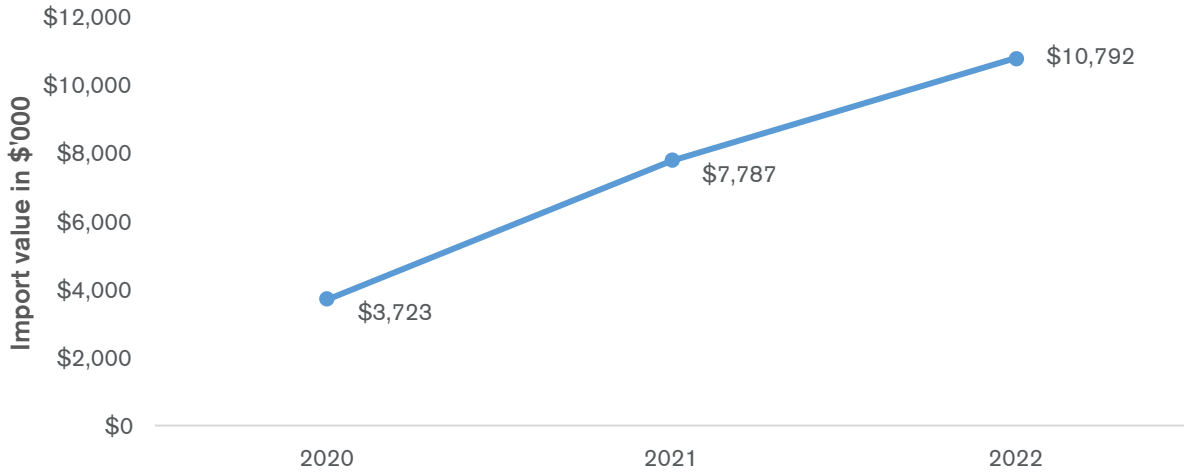


Chart 15 Saudi Arabia frozen bovine meat imports from Jordan

### Saudi Arabia trade agreements with Jordan

There are no specific bilateral trade agreements between Saudi Arabia and Jordan. However, there are broader agreements, as both nations are members of wider regional trade initiatives that might facilitate trade. These include:

The Greater Arab Free Trade Area (GAFTA). Saudi Arabia and Jordan are members of GAFTA, a regional trade agreement among Arab League member states. GAFTA applies to all products of Arab origin including agriculture, aiming to promote economic integration and reduce tariffs.

### Saudi Arabia PESTEL analysis

#### Politics

Saudi Arabia is a monarchy with strong central governance, where political stability is a key feature. As a central player in the Middle East, its foreign policies and relations, especially within the Gulf Cooperation Council (GCC) have significant regional implications.

Saudi Arabia and Jordan have worked closely on regional and international issues and are seen as having model diplomatic relations. The two nations for example share a similar political viewpoint with major regional concerns such as Palestine, Iran, Iraq, Syria, and Yemen.

#### Economics

At 8.7% growth in 2022, Saudi Arabia led the G20 nations, supported by oil and non-oil revenues, private consumption, and non-oil private investment.

Saudi Arabia is furthermore Jordan's largest economic partner, with investments exceeding \$13 billion. Trade between the two countries reached around \$5 billion in 2021. Saudi Arabia has also been a major donor to Jordan, providing substantial financial assistance, including a recent direct funding of \$50 million as part of a larger economic aid package agreed upon in 2018.

On a sector-specific level, Saudi Arabia was the world's sixteenth largest frozen bovine meat importer in 2022, accounting for a value of \$460 million.

<sup>33</sup> (ITC Trade Map, Existing and potential trade between Saudi Arabia and Jordan in 2022, 2023)



## Social

Overall, the social relations between Saudi Arabia and Jordan are defined by close historical roots and joint efforts in areas like education, and regular high-level interactions, underscoring the strong and multifaceted ties between the two nations.

With Saudi Arabia being a Muslim nation, Halal certification is necessary.

## Technology

The expansion of cold chain distribution networks for frozen food in supermarkets and hypermarkets is driving the demand for packaged and frozen foods in the region. Frozen processed halal meat and poultry are becoming increasingly popular in the Middle Eastern region, including Saudi Arabia.

## Environment

Saudi Arabia is exposed to a number of environmental concerns. The region is particularly vulnerable to climate change, with threats like desertification putting 70 – 90% of land at risk. That said, steps are underway to combat desertification and expand green areas. Regarding local beef production, there might be concerns on matters including the extent of water usage and greenhouse emissions, exacerbated by local climatic conditions.

## Legal

The HS 02023010 import tariff for Jordan is preferential at 0%. Saudi Arabia and Jordan are members of GAFTA.

## Saudi Arabia frozen bovine meat distributors

- Abbar & Zainy Cold Stores. A distributor of diversified food types, Abbar & Zany supplies chilled and frozen meats. **Social media site:** <https://abbarfoods.com>
- Almunajem Foods. With a significant presence in Saudi Arabia, Almunajem Foods imports and distributes meats, including beef from Brazil and New Zealand. **Website:** <https://almunajemfoods.com/>
- Food Nation. A beef supplier from Australia, New Zealand and Brazil, Food Nation distributes frozen beef to the hospitality sector in Saudi Arabia. **Website:** <https://www.foodnation.com.sa/>
- Golden Meat International. Headquartered in Riyadh, Golden Meat imports and distributes fresh, chilled, and frozen meat. **Website:** <https://goldenmeat.com.sa/>
- Gulfwest Company Limited. A leading food importer and distributor in Saudi Arabia, Gulfwest supplies chilled and frozen foods, including beef. **Website:** <https://www.gulfwest.com/>
- Quality Food Company: As an importer and distributor located in Jeddah, Quality Food Company offers a wide range of high-quality meats including beef and veal. The company stresses quality, consistency, and traceability in their products. **Website:** <https://qualityfood.co/>
- Western Meat Trading Company. An importer of high-quality meats, Western Meat Trading Company imports beef from Australia, Brazil and Canada. **Website:** <https://www.westernmeat.me/>.

## Exhibitions and trade fairs in Saudi Arabia

Dates	Exhibition name	City	Country	Website
12 - 14 May 2025	The Saudi Food Show 2025	Riyadh	Saudi Arabia	<a href="https://www.thesaudifoodshow.com/">https://www.thesaudifoodshow.com/</a>



# The United Arab Emirates

## United Arab Emirates macroeconomic overview

GDP growth of 3.5% is estimated for 2023 in the United Arab Emirates, following 7.4% growth in 2022.<sup>34</sup> Inflation is currently projected at 3.4%. The implementation of an IMF reform is further expected to limit medium-term growth.<sup>35</sup>

Economic growth is forecasted to slow, though support exists due to strong oil pricing and economic policies focused on foreign investment, which are intended to aid diversification strategies.

## United Arab Emirates frozen beef consumption<sup>36</sup>

Consumption of frozen beef in the United Arab Emirates exhibits positive and sustained growth, with trends indicating higher consumption among males than females.

From 2015 to 2020, the frozen meat market in the Emirates, which includes all meats, recorded a compound annual growth rate (CAGR) of 5.69%. Sales reached an estimated \$560 million in 2020, growing 2.1% over the previous year. In 2020, frozen meat constituted the largest category within the meat market.

Estimated growth of 6.4% between 2021 and 2027 is credited to influences such as an increasing population, an active tourism segment, economic growth, rising disposable income, and access to online delivery channels.<sup>37</sup>



## United Arab Emirates beef imports

United Arab Emirates frozen beef imports registered an increase of 32% from 2018 to 2022, achieving a value of \$417.8 million in 2022. The largest suppliers were Brazil, India, the United States, Australia, Jordan and Saudi Arabia.

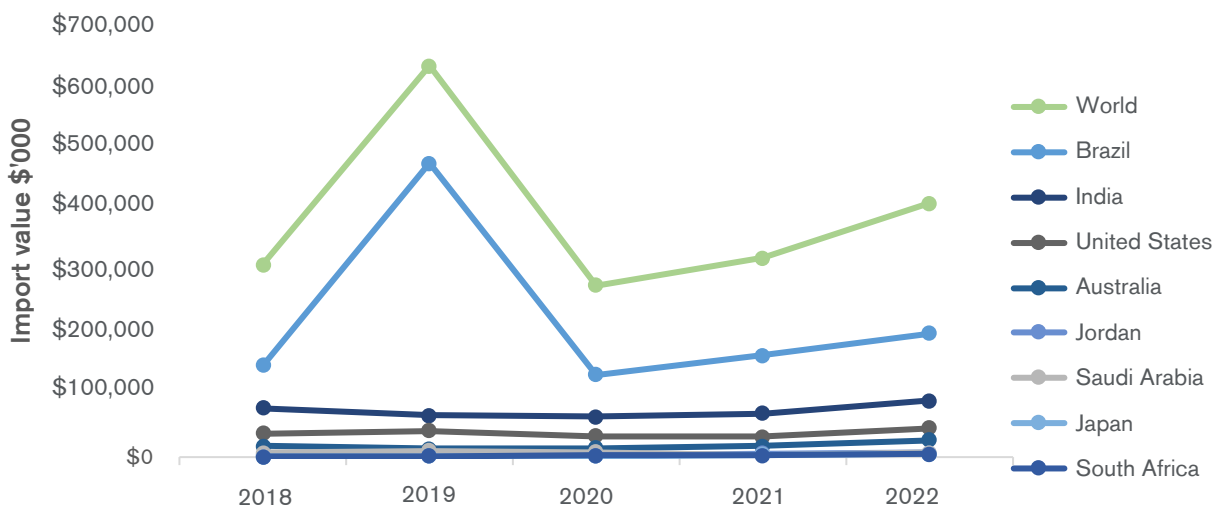


Chart 16 UAE frozen bovine meat, main supplying countries, 2018 to 2022

<sup>34</sup> (The World Bank, GDP growth (annual %) - United Arab Emirates, 2023)

<sup>35</sup> (Zawya, UAE's economic outlook remains positive, GDP to grow at 3.6% in 2023 - IMF, 2023)

<sup>36</sup> Recently compiled data and forecasts on beef consumption and production in the United Arab Emirates were not available at the time of research, unlike the sections on Indonesia and Saudi Arabia.

<sup>37</sup> (GlobalData, United Arab Emirates (UAE) Frozen Meat (Meat) Market Size, Growth and Forecast Analytics to 2025, 2022)



In 2022, the United Arab Emirates was the world's seventeenth-largest importer of frozen bovine meat, with imports valued at \$417 million. Of this trade, 94.7% was categorised under frozen, boneless meat of bovine animals (HS 020230). Frozen bovine cuts with bone in (HS 020220) accounted for 4.8%, and frozen bovine carcasses and half-carcasses (HS 020210) comprised 0.5%.<sup>38</sup> The United Arab Emirates is a net importer of frozen bovine meat. In 2022, exports in this category amounted to \$159.3 million, 99% of which was frozen, boneless meat of bovine animals (HS 020230).<sup>39</sup>

#### United Arab Emirates trade in frozen bovine meat <sup>40</sup>

For frozen, boneless meat of bovine animals (HS 020230), the average import value was \$4,109 per ton, compared to \$6,292 per ton for frozen bone-in bovine cuts (HS 020220) and \$4,329 for frozen bovine carcasses and half-carcasses (HS 020210). Since 2018, prices for frozen, boneless meat have broadly increased.<sup>41 42 43</sup>

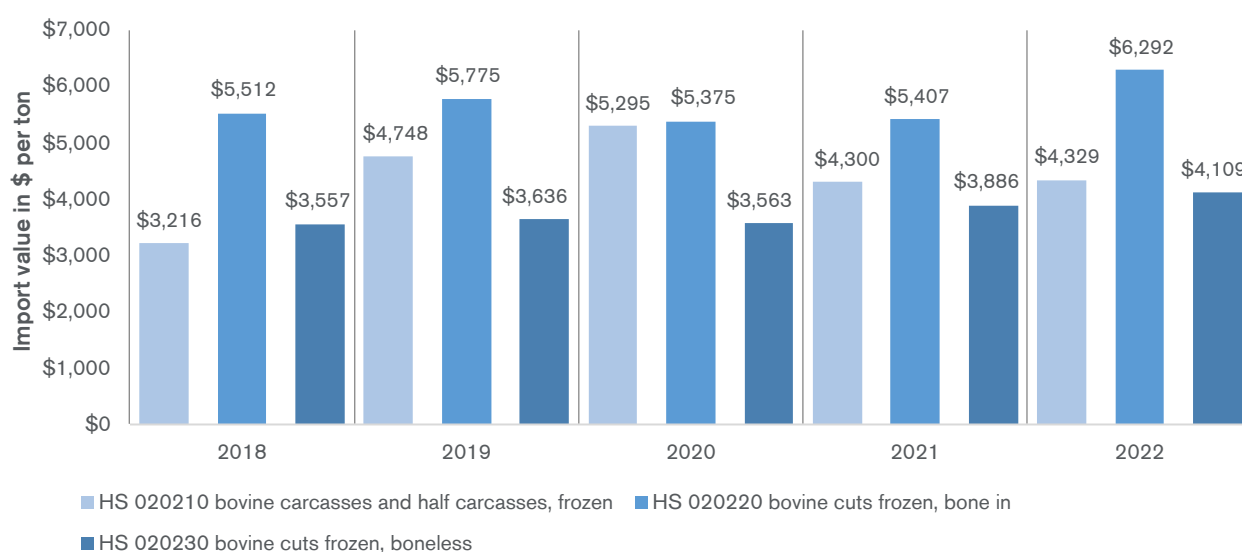


Chart 17 UAE frozen bovine meat imports in \$ per ton

#### United Arab Emirates trade in frozen bovine meat from Jordan

Building on exports of \$3.3 million in 2020 to \$7.7 million in 2022, Jordan's exports of frozen, boneless meat of bovine animals (HS 020230) to the United Arab Emirates, marked a strong 134% growth.

<sup>38</sup> (ITC Trade Map, Existing and potential trade between United Arab Emirates and Jordan Product: 0202 Meat of bovine animals, frozen, 2023)

<sup>39</sup> (ITC Trade Map, List of products exported by United Arab Emirates detailed products in the following category: 0202 Meat of bovine animals, frozen, 2023)

<sup>40</sup> In this section, the average United Arab Emirates imported value for HS 0202 frozen bovine meat was not reported.

<sup>41</sup> (ITC Trade Map, List of importers for the selected product, Product: 020210 Frozen bovine carcasses and half-carcasses, 2023)

<sup>42</sup> (ITC Trade Map, List of importers for the selected product, Product: 020220 Frozen bovine cuts, with bone in (excl. carcasses and half-carcasses), 2023)

<sup>43</sup> (ITC Trade Map, List of importers for the selected product, Product: 020230 Frozen, boneless meat of bovine animals, 2023)

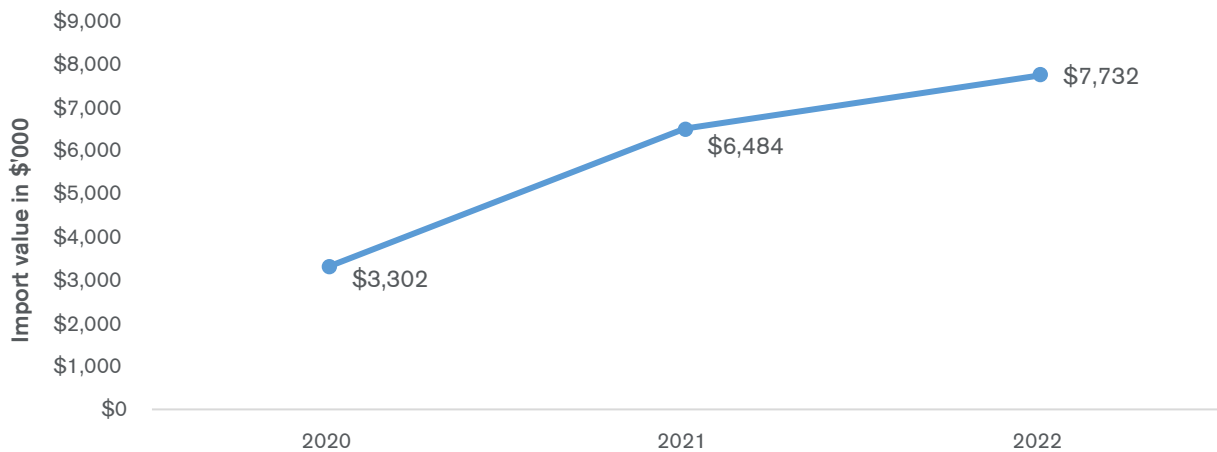


Chart 18 UAE frozen bovine meat imports from Jordan

### United Arab Emirates trade agreements with Jordan

There are no specific bilateral trade agreements between the United Arab Emirates and Jordan. However, both nations are members of wider regional trade initiatives that might facilitate trade. These include:

The Greater Arab Free Trade Area (GAFTA). Both the UAE and Jordan are members of GAFTA, which is a regional trade agreement among Arab League member states. GAFTA applies to all products of Arab origin including agriculture, aiming to promote economic integration and reduce tariffs.

Industrial agreements between Bahrain, Egypt, Jordan and the United Arab Emirates, Though not involving frozen bovine meat production, companies from the four countries signed industrial agreements valued more than \$2 billion in February 2023, at the third Higher Committee Meeting of the Industrial Partnership for Sustainable Economic Development in Amman.

### United Arab Emirates PESTEL analysis

#### Politics

The United Arab Emirates benefits from political stability, which has helped advance business and economic development. The country's active foreign policy, particularly its relations within the Gulf Cooperation Council and with global powers, has defined its international status.

Political relations between the United Arab Emirates and Jordan are defined by deep-rooted connections, focusing on cooperation, strategic partnerships, and regional stability.

#### Economics

With a 7.4% incline in GDP during 2022, the United Arab Emirates, benefits from a strong economy, 29<sup>th</sup> largest in the world, that continues on a path of diversification away from oil to other sectors including tourism, transport and private investment. GDP in 2022 was \$507.5 billion and GDP per capita was \$53,800.

Economic relations between the United Arab Emirates and Jordan are robust, focusing on investment, development, and industrial cooperation.

On a sector-specific level, the United Arab Emirates was the world's seventeenth largest frozen bovine meat importer in 2022, accounting for a value of \$418 million.



## Social

Social relations between the United Arab Emirates and Jordan are defined by close historical roots and joint efforts in areas like education, and regular high-level interactions, underscoring the strong and multifaceted ties between the two nations.

A multicultural society, with a large expatriate population, very good infrastructure and high living standards. The food service industry and tourism sectors have contributed to the rebound of beef consumption in the country.

With the United Arab Emirates being a Muslim nation, Halal certification is necessary.

## Technology

The expansion of cold chain distribution networks for frozen food in supermarkets and hypermarkets is driving the demand for packaged and frozen foods in the region. Frozen processed halal meat and poultry are becoming increasingly popular in the Middle Eastern region, including the United Arab Emirates.

## Environment

The United Arab Emirates is exposed to a number of environmental concerns. The region is particularly vulnerable to climate change, with threats like desertification putting 70 – 90% of land at risk.

The Emirates faces a shortage of arable land and water, reducing its domestic food production capabilities. Consequently, the country relies heavily on imports to satisfy its food demand, accounting for about 80% of the total food supply.

## Legal

The HS 02023010 import tariff for Jordan is preferential at 0%. The United Arab Emirates and Jordan are members of GAFTA.

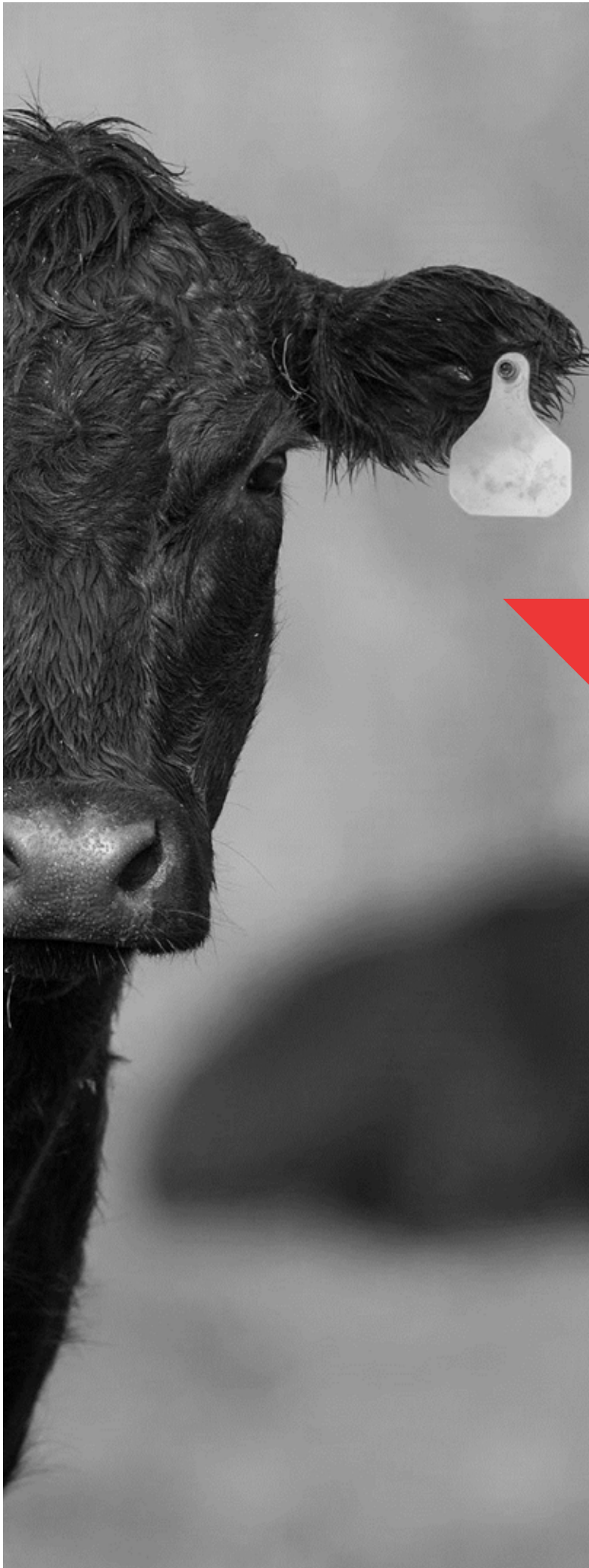
## United Arab Emirates frozen bovine meat distributors

Here are some of the major meat distributors in the United Arab Emirates:

- Ahmed Al Ali Trading. An import and distribution firm based in Dubai; Ahmed Al Ali Trading is also a supplier of frozen beef. **Website:** <http://ahmedalalitrading.com/>
- Al Eatemad Foodstuff and Meat Co. A supplier of frozen and fresh beef, Al Eatemad distributes meat products from countries such Australia. **Website:** <https://aleatemad.ae/>
- Country Hill. Country Hill imports and distributes high-quality meats from Australia, New Zealand, Japan and Europe. **Website:** <https://www.countryhill.ae/>
- Elfab Co. Elfab is a Dubai-based supplier of fresh and frozen meats, including beef and veal. **Website:** <https://elfabshop.com/>
- Faisal Al Nusif Trading Co. An established importer and exporter of fresh and frozen meats from Australia, Brazil and the United States. **Website:** <https://www.fantco.com/>
- GCC Foodstuff Trading. An importer and exporter of frozen and fresh meat, GCC Foodstuffs Trading, sources from countries like India. **Website:** <https://gccfoodstuff.com/>
- Siam Trading Company. Located in Dubai, Siam Trading is an importer and supplier of frozen meat and other product groups. **Website:** <https://siamuae.com/>

## Exhibitions and trade fairs in the United Arab Emirates

Dates	Exhibition name	City	Country	Website
17 - 21 Feb 2025	Gulfood 2025	Dubai	United Arab Emirates	<a href="https://www.gulfood.com/">https://www.gulfood.com/</a>



## **Recommendations**



## Recommendations in summary

“Global beef production and consumption are gradually rising, particularly in East Asia. Beef production is expected to reach 59.1 million tons and consumption 57.5 million tons in 2023. Frozen bovine meat imports under HS 0202 totalled \$38.7 billion in 2022, a 58% increase since 2018.

Jordan's top markets, including Saudi Arabia, the United Arab Emirates, Qatar, and Kuwait, have shown rising trade values from 2018 to 2022, with no evidence of exports to Indonesia. Saudi Arabia and the United Arab Emirates, as the world's respective sixteenth and seventeenth largest importers in this category, represent significant markets with further potential for Jordanian exporters. Jordan accounts for approximately 2.3% of Saudi category imports and 1.9% in the Emirates.

The Gulf nations offer opportunities due to their powerful economies, proximity, accessible transport, effective cold storage infrastructure, and cultural parallels with Jordan. Their significant meat consumption, along with growing demand for Halal certification, traceability, sustainable production, and organic products, present additional prospects.

For Jordan, Indonesia, the world's seventh largest importer of frozen bovine meat with \$813.7 million in trade in 2022 and the most populous Muslim nation, could be a new market to explore. Jordan's current exports stand at around \$25.5 million, and Indonesia could be a gateway to East Asia, which shows the fastest growth in this category with an estimated annual increase of 0.4 kg per person.



## **Reference information**



# Priority markets tariff and non-tariff barriers<sup>44</sup>

## Indonesia

### Tariffs

HS 0202 – Frozen meat of bovine animals; example, HS 02023000 – Frozen, boneless meat of bovine animals.

Most favoured nation (MFN) duties of 5% are applied for Jordan.

Indonesia does not apply any trade remedy on HS 02023000.

### General requirements

General requirements are stipulated in Ministry of Agriculture Regulation Number 15 Year 2021 entitled, “The Business Activities and Product Standards of Risk-Based Business Licensing Administration of the Agriculture Sector.” These broadly include:

- Country of origin requirements include evidencing negligible Bovine Spongiform Encephalopathy risk.
- Conformity assessment of the production facilities are to be carried out by Indonesia’s Center for Plant Variety Protection and Agricultural Licensing (PPVTPP) and the Technical Team of the Directorate General of Livestock and Animal Health Services. Firms that are approved are required to apply for an import permit within a three-month time limit.
- Packaging should be food grade and labelling in both Indonesian and English languages. These should indicate:
  - Country of destination Indonesia
  - Name and address of the business unit
  - Business unit’s establishment number
  - Production date
  - Amount, types, and specification of the animal product
  - Halal mark for required animal products, in accordance with the legislation; and
  - Lot number (batch) and expiry date.
- Halal certification - mandated under Government Regulation 39 of 2021, halal certification is necessary. Halal certificates are issued by bodies recognised by the Halal Authority of Indonesia, Badan Penyelenggara Produk Halal – BPJPH

### Additional detail

Further detail on Indonesian import requirements for frozen bovine meat can be found in the following references.

Ministry of Agriculture Regulation Number 15 Year 2021 (unofficial translation)

Link. <https://tinyurl.com/4zm2ekvx>

Halal Authority of Indonesia, Badan Penyelenggara Produk Halal

Link. <https://tinyurl.com/mr3pp3yd>

International Trade Administration – Indonesia country commercial guide

Link. <https://tinyurl.com/4r2vmxf2>

ITC market access map

Link. <https://tinyurl.com/37y8wzfb>

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<sup>44</sup> In respect to the identification of tariff and non-tariff barrier rules for import, the following section details requirements for HS 310290, where Jordan’s major exports are classified.



# Saudi Arabia

## Tariffs

HS 0202 – Frozen meat of bovine animals; example, HS 02023010 – Frozen, boneless meat of bovine animals, minced (chopped). Preferential tariff for Jordan 0%.

It is important to note that other countries may be subjected to MFN duties at a rate of 5.00%.

Saudi Arabia does not apply any trade remedy on HS 07020000

## General requirements

The Saudi Food and Drug Authority stipulates the regulations for importing meat into Saudi Arabia, broadly including the following requirements:

- All meat shipments in terms of their produce and preparations, must comply with approved Gulf Standards, e.g.
  - Gulf technical regulation (GSO 997\2016). Chilled and frozen beef, buffalo, lamb and goat”
  - Gulf technical regulation (GSO 993\2015). Requirements of animal slaughter according to Islamic provisions.
  - Gulf technical regulation (GSO 523\1994). Additives guidance for livestock and poultry feed according to their safety of use.
  - Gulf technical regulation (GSO 9\2013). Labels of packed foodstuffs
  - Gulf technical regulation (GSO 21\1984). Health conditions in food factories and their workers.
  - Gulf technical regulation (GSO 150/2007). Shelf Life Standard.
- A12-month shelf-life recommendation for frozen meat and poultry. A recommended expiration period of 3 months for chilled vacuum-packed meat and poultry.
- The prohibition of imports from countries with epidemic diseases listed in Saudi Arabia’s Veterinary Quarantine Law and abattoirs that are not approved.
- Imported meat and poultry should be accompanied by a Halal certificate specifying the slaughter date, animal type, age, and veterinary inspection for not more than 12 hours before and after slaughter, to ensure safety and suitability for human consumption. Slaughterhouses should implement the Hazard Analysis and Critical Control Points (HACCP) system at all production stages.
- A health certificate, recognised by the competent authority, stating meat type and affirmation that regulated animal protein substances, fats, or animal waste were not used in feed, and animals were not treated with growth-stimulating substances.
- No more than four months can be exceeded, from slaughter to arrival in Saudi Arabia for frozen meat, and temperatures should not exceed -18 degrees Celsius
- Frozen meat in small portions can be packed in waxed cardboard or polyethylene with comprehensive labelling. proper placement of seals on chilled and frozen carcasses and their parts. These include affixing a label securely to one end of the carcass to provide additional data, ensuring it is not easily removable. Seal shall have proper space and a diameter between 6 and 10 cm. Data should state:
  - Country of origin
  - Inspected and passed
  - Abattoir number or registration number
  - Date of slaughtering



### Additional detail

Further details on Saudi Arabia's import requirements for frozen bovine meat can be found in the following references.

International Trade Administration – Saudi Arabia country commercial guide

Link. <https://tinyurl.com/4hycem4h>

Zakat, Tax and Customs Authority

Link. <https://tinyurl.com/8abmk84j>

Saudi Food and Drug Authority – Rules and regulations to importing meat

Link. <https://tinyurl.com/2rvw3auv>

ITC market access map

Link. <https://tinyurl.com/yadvc3fp>



## United Arab Emirates

### Tariffs

HS 0202 – Frozen meat of bovine animals.

Example, HS 02023010 – Frozen, boneless meat of bovine animals, minced (chopped). Preferential tariff for Jordan 0%.

It is important to note that other countries may be subjected to MFN duties at a rate of 5.00%.

The United Arab Emirates does not apply any trade remedy on HS 07020000

### General requirements

The regulations for importing meat into the United Arab Emirates are stipulated by the Ministry of Climate Change and Environment while the Federal Customs Authority sets the country's customs policies. Broadly regulations include the following requirements:

- All meat shipments in terms of their produce and preparations, must comply with approved Gulf Standards, e.g.
  - Gulf technical regulation (GSO 997\2016). Chilled and frozen beef, buffalo, lamb and goat
  - Gulf technical regulation (GSO 993\2015). Requirements of animal slaughter according to Islamic provisions.
  - Gulf technical regulation (GSO 523\1994). Additives guidance for livestock and poultry feed according to their safety of use.
  - Gulf technical regulation (GSO 9\2013). Labels of packed foodstuffs
  - Gulf technical regulation (GSO 21\1984). Health conditions in food factories and their workers
  - Gulf technical regulation 150/2007. Shelf Life Standard, the recommended shelf life for frozen meat and poultry is 12 months. Chilled vacuum-packed meat/poultry has an expiration period of 3 months.
- Original health certificate from the concerned exporting country's authority testifying the product's safety for human consumption.
- A Halal slaughter certificate is required, issued by an Islamic organisation recognised by the UAE government.



- Bill of lading or bill of entry or airway bill, packing list which details the number of cartons and weight, delivery order and invoice with HS code and correct value.
- Certificate of origin, stating the country of origin and approved by the Chamber of Commerce in the country of origin.
- Health certificate issued by the source country's government or local authority
- MOH approval (for UAE customs regulations) or import permit from the competent agencies (for restricted goods or duty exempted goods)
- Labelling in Arabic should include.
  - Brand name.
  - Name and a Brief Description of the Product
  - List of ingredients of the product.
  - Expiration Date
  - Manufacturer's, packer's, and distributor's names.
  - Food's entire net weight or volume.
  - Manufactured Country Name.
  - Merchandised Barcode.
  - Product's Lot number.
  - Storage Condition (cold/hot environment)
  - Result of the Laboratory Test (for goods being sold in Dubai)

#### **Additional detail**

Further details on United Arab Emirates import requirements for frozen bovine meat can be found in the following references.

International Trade Administration – United Arab Emirates country commercial guide

**Link.** <https://tinyurl.com/5dnm6syz>

Abu Dhabi Food Control Authority

**Link.** <https://tinyurl.com/7b8az7uk>

Dubai Municipality Food Code 2020

**Link.** <https://tinyurl.com/mry5d26c>

Ministry of Climate Change and Environment approved Halal slaughterhouses (November 2023)

**Link.** <https://tinyurl.com/4mk5frwd>

ITC market access map

**Link.** <https://tinyurl.com/mu3cx2uz>



# Methodology

The study employs desktop research and concentrates on the underlying product, its capacity, supply, demand globally and in particular priority markets. In addition, the study covers export and import statistics, trade barriers and import requirements. The objective is to give insight on merchandise trade dynamics in the Jordanian context.

## Priority Markets Selection Criteria

The selection of priority markets is based on a comprehensive set of criteria:

- **Annual Imported Quantities:** Evaluating the volume of imports to gauge market size.
- **Growth Rate in Quantities:** Assessing the rate of growth to identify expanding markets.
- **Market Concentration:** Analyzing the distribution of market share among competitors.
- **Export Potential:** Determining the potential for export between Jordan and the target market.
- **Tariff and Non-Tariff Barriers:** Considering the impact of trade barriers on market entry.

Additionally, all financial figures are conducted in US dollars.

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