



Processed meat

HS Code 1602



TRADE  
FOCUSED  
PRODUCT  
REPORTS



Kingdom of the Netherlands

Implemented by



# **TRADE FOCUSED PRODUCT REPORTS**

**PROCESSED MEAT**

**HS Code 1602**

**MARCH 2024**

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# Glossary of terms and abbreviations

## 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.

## 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, the 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 Shannon Entropy value of 4.61 in 2021 for prepared/preserved meat, HS code 1601 – as stated in this study – suggests a fragmented market with no dominant player and potentially diverse offerings due to exports from around 24 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.

## 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).

## 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:

Production x 100 / (Production + Imports – 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.

# Product descriptions by HS 6-digit code

## HS 160210 – Homogenised prepared meat, offal, blood or insects

Finely processed meat products that have been homogenised.



## HS 160220 – Preparations of liver of any animal

Meat preparations of the prepared or preserved liver of any animal, with certain exclusions e.g., sausages and similar products.

## HS 160231 – Meat or offal of turkeys

Meat or offal of turkeys, excluding certain items e.g., sausages, finely homogenised preparations such as infant food or for dietetic purposes for retail sale.



## HS 160232 – Meat or offal of fowls of the species "Gallus domesticus", prepared or preserved

Processed meat or meat offal of fowls of the species "Gallus domesticus," with certain exclusions e.g., sausages and similar products.

## HS 160239 – Processed meat or meat offal of ducks, geese, and guinea fowl

Processed meat or meat offal of ducks, geese, and guinea fowl, with certain exclusions e.g., sausages and similar products.

## HS 160241 – Hams of swine and cuts thereof, prepared or preserved

As defined in the title.

## HS 160242 – Prepared or preserved shoulders and cuts thereof, of swine

As defined in the title.

## HS 160249 – Processed meat and offal of swine

As defined in the title.

## HS 160250 – Processed meat or offal of bovine animals

Processed meat or offal of bovine animals, with certain exclusions e.g., sausages and similar products.

## HS 160290 – Processed meat, offal, blood or insects

Various types of processed meats and cocoa-based products, all packaged in containers or immediate packings of 2 kilograms or less.



### Explanatory note

In respect to Jordan's trade data reported in this study, significant discrepancies were identified between category exports and imports, when using the trade statistics database employed in research, namely ITC Trade Map, which in turn accesses UNCTAD and WTO data.

Fundamentally, here, Jordan's export data varies from that recorded by importers. It is for this reason that when it comes to assessing Jordan's exports in PROCESSED MEAT HS Code 1602, import data reported by Saudi Arabia, the United Arab Emirates, and Kuwait – the three priority markets – has been employed to approximate and estimate the Hashemite Kingdom's trade exports, to maintain reasonable consistency throughout.

In cases where it is not possible to use import numbers, for example, in classifying product values at the HS6 level, statistics reported by the Jordanian Customs are retained.

# Executive summary

From 2018 to 2023, processed meat industry revenues held at \$273 billion to \$319 billion, reflecting an encouraging sign of growth.

2024 revenue is estimated to reach \$336 billion, fueled by evolving consumer preferences and by 2029, the market size is expected to expand significantly, reaching \$430 billion.

Consumption declined to 16.9 billion kilograms in 2022. However, the estimated consumption volume of 17.2 billion kilograms in 2023 indicates a reversal. This upward trajectory is projected to continue in 2024, reaching 17.5 billion kilograms.

The processed meat market is undergoing shifts driven by consumer preferences and industry innovations. Home delivery services have emerged as an importer driver, propelling the global market toward a market size of \$349.5 billion by 2023.

Convenience and food safety fuel this growth, with projected revenues reaching \$634.5 billion by 2033. Meanwhile, within the packaged meat segment, flavourful trends take centre stage. Consumers demand good-tasting products, leading to the rise of ready-to-eat options like salami and sausages. Innovative preservation techniques, such as high-pressure processing (HPP), are becoming increasingly popular, enhancing taste and extending shelf life. Sustainability is also pivotal, with meat producers adopting eco-friendly practices and cold chain facilities embracing energy-efficient solutions. Real-time monitoring and Internet of Things (IoT) devices equally represent advancing technologies in the industry for safer, greener cold storage.

Traceability, moreover, gains prominence in the supply chain, as consumers demand transparency in meat sourcing and production methods.

Ranked 31st globally, Jordan has emerged as a prominent processed meat exporter in the Middle East, second only to the United Arab Emirates. Notably, its total export value of processed meat achieved a 9% compound annual growth rate (CAGR) between 2018 and 2022, climbing from \$32.2 million to \$50.1 million.

Jordanian processed meat exporters have a compelling opportunity to expand into the lucrative and growing markets of Saudi Arabia, the United Arab Emirates, and Kuwait. These markets offer significant potential despite anticipated reductions in individual per capita consumption, thanks to their strong economies and high GDPs. While these countries may see slightly lower individual consumption, their growing populations, rising disposable incomes, increasing preference for convenience foods, and dynamic tourism sectors, particularly in Saudi Arabia and the United Arab Emirates, still present considerable opportunities for Jordanian exporters. However, success in these markets hinges on meticulous planning and strict adherence to regulations. All three countries enforce stringent GSO food standards, encompassing fresh meat quality, storage protocols, hygiene, and compliance with Islamic slaughter methods.



## Product overview

# Production and consumption

From 2018 to 2023, global industry revenues grew from an estimate \$273 billion<sup>1</sup> to \$319 billion. Furthermore, projections suggest a market size of \$430 billion by 2029.<sup>2</sup>

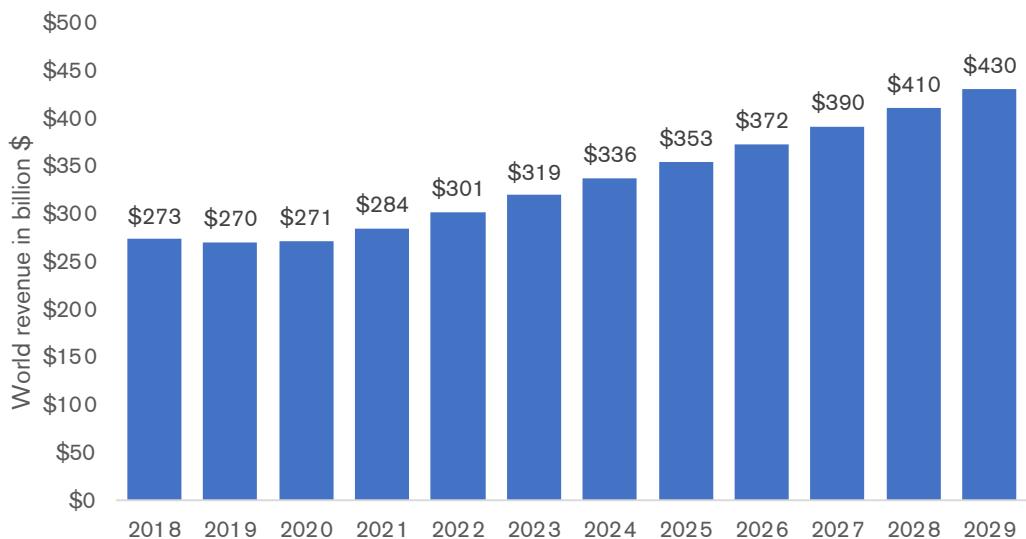


Chart 1 Worldwide revenue of processed meat, 2018 to 2029, in \$ billion

From 2018 to 2022, there was a gradual decline in consumption quantities, with the lowest point recorded in 2022 at 16.9 billion kilograms.<sup>3</sup> However, in 2023, consumption volumes were estimated to achieve 17.2 billion kilograms, and this positive trajectory is projected to continue in 2024, reaching 17.5 billion kilograms. Several factors contribute to the fluctuations in processed meat consumption. Health-conscious consumers increasingly opt for alternative protein sources, limiting demand for processed meats. The COVID-19 pandemic has also disrupted production, supply chains and consumer spending.

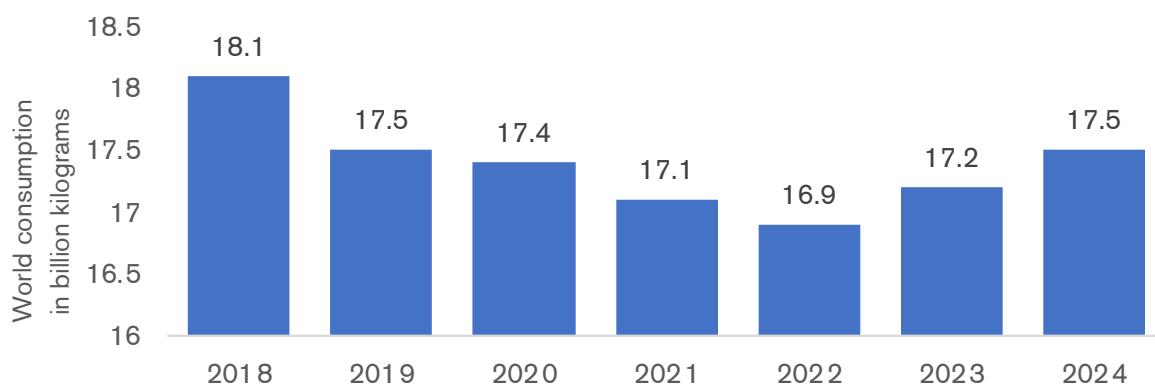


Chart 2 World consumption of processed meats in billion kilograms, 2022 to 2024

<sup>1</sup> Statista (2024), Revenue of the processed meat worldwide in 2018 to 2029, [online]. Available at: <https://www.statista.com/statistics/911596/forecast-global-market-value-of-processed-meat/>

<sup>2</sup> Statista. (2024). Processed Meat - Worldwide. [online] Available at: <https://www.statista.com/outlook/cmo/food/meat/processed-meat/worldwide#revenue>

<sup>3</sup> Ibid

## Processed meat pricing

Processed meat pricing reveals an upward trajectory. From 2018 to 2024, the price per kilogram is projected to increase, reflecting factors such as inflation, supply chain dynamics e.g., shipping costs, and changing consumer preferences e.g., shifts towards plant-based options and organic products. Notably, the jump from \$9.3 in 2021 to \$10 per kilogram in 2022 indicates a more pronounced acceleration.<sup>4</sup> As we move forward, market participants should closely monitor these pricing trends and consider their implications for profitability and affordability within the industry.

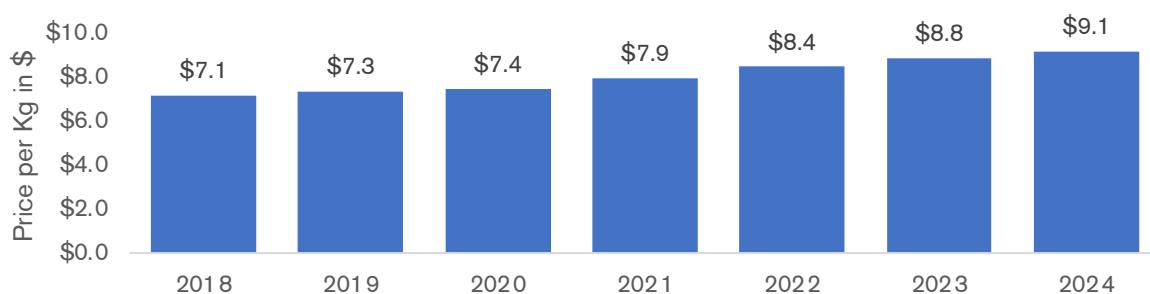


Chart 3 Global pricing per Kilograms, 2018 to 2024 in \$

## Exports and imports

Thailand dominates the global preserved meat export market by value, boasting \$3 billion in export trade in 2022.<sup>5</sup> and a 15% share of the worldwide market. Germany, China and Poland collectively follow, holding a 26% global market share. Between 2015 and 2022, the value of preserved meat increased at a compound annual growth rate (CAGR) of 5%, rising from \$14.5 billion to \$20.2 billion.<sup>6</sup>

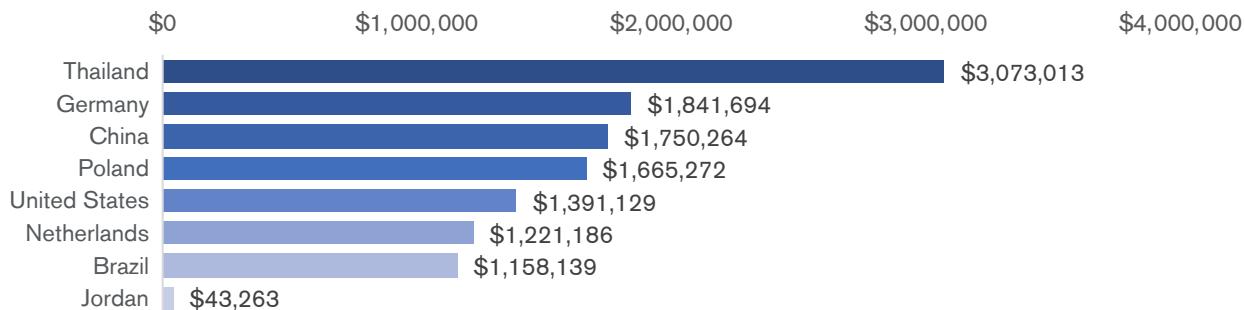


Chart 4 Leading exporters of processed meats, by value in 2022

<sup>4</sup> Statista. (2024). Processed Meat - Worldwide. [online] Available at:

<https://www.statista.com/outlook/cmo/food/meat/processed-meat/worldwide#revenue>

<sup>5</sup> ITC (2022). Trade Map - List of exporters for the selected product in 2022 (Prepared or preserved meat, meat offal, blood or insects (excl. sausages and similar products, ...)). [online] Available at:

[https://www.trademap.org/Country\\_SelProduct.aspx?nvpm=1%7c%7c%7c%7c%7c1602%7c%7c%7c4%7c1%7c1%7c2%7c1%7c1%7c2%7c1%7c1%7c1%7c1](https://www.trademap.org/Country_SelProduct.aspx?nvpm=1%7c%7c%7c%7c%7c1602%7c%7c%7c4%7c1%7c1%7c2%7c1%7c1%7c2%7c1%7c1%7c1%7c1%7c1)

<sup>6</sup> The Compound Annual Growth Rate (% CAGR) has been calculated based on the annual growth rate of prepared/preserved meat global exports, utilising data sourced from ITC spanning the years 2015 to 2022. This measurement gives us a yearly growth rate, ironing out any ups and downs to present a stable, year-over-year growth rate.

Japan and the United Kingdom are the world's largest importers of preserved meat by value, accounting for 33% of global trade in 2022 (estimated at \$ 19.1 billion), with imports worth \$3.3 billion and \$2.9 billion, respectively (refer to Chart 4). The United States, Germany and the Netherlands follow in the global import standings, collectively contributing 18% to international imports. Between 2015 and 2022, the value of preserved meat imports increased at a CAGR of 4%, rising from \$14.9 billion to \$19.4 billion.

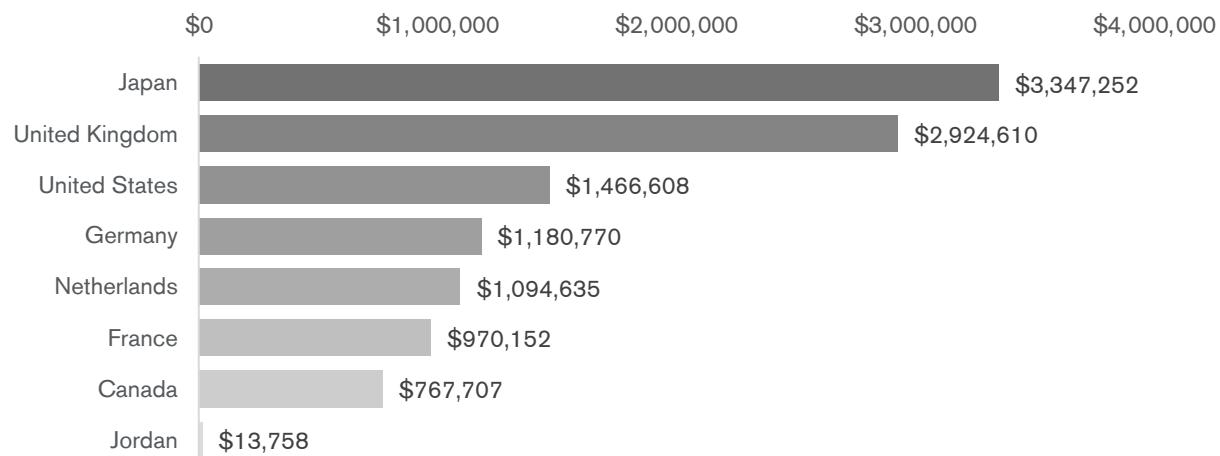


Chart 5 Top processed meats importers by value in 2022, in '\$000

<sup>8</sup> Refer to footnote 2.



## Market dynamics

# Demand and supply trends

## Home delivery drives the processed meat market

The global processed meat market is expected to reach a massive \$349.5 billion in 2023.<sup>9</sup> This growth is fuelled by the rise of convenient home delivery services, which are predicted to shape the market significantly in the coming decade. Overall demand for processed meat is projected to climb steadily at a rate of 6.5% per year, reaching an estimated \$634.5 billion by 2033.

## Flavourful trends in packaged meat

The packaged meat market is thriving due to rising consumer demand for flavoured and nutritious products. Various herbs, marinades, seasonings, and spices enhance the taste and texture of packaged meats. As consumers seek convenience without compromising flavour, intricate meat preparations are being replaced by ready-to-eat options like salami and sausages. Adopting cross-country food culture and innovative preservation techniques, such as high-pressure processing (HPP), further contributes to market growth. HPP not only kills microbes but also extends meat shelf life significantly.<sup>10</sup>

## Sustainable innovations transforming the cold chain

In response to mounting environmental concerns, both meat producers and the cold chain industry are taking significant strides toward sustainability. Meat producers are adopting innovative livestock management techniques, while cold chain facilities invest in energy-efficient solutions like solar-powered cold rooms and eco-friendly refrigerants.<sup>11</sup> Simultaneously, real-time monitoring and smart Internet of Things (IoT) devices enhance cold storage safety, transparency, and efficiency. These parallel trends promise a greener, more efficient journey for perishable goods from farm to table.<sup>12</sup>

## Traceability in the supply chain

Consumers' growing desire to understand food origin drives the push for greater meat traceability in the supply chain. They are no longer satisfied with nutritional information, seeking details about livestock raising, processing methods, and their impact on food safety, animal welfare, the environment, and worker well-being.<sup>13</sup>

## Tackling the big footprint

Meat producers face challenges in reducing their carbon footprint, but some are finding innovative solutions. Companies like Le Picoreur, a pioneering French brand of 100% organic poultry, are shrinking their environmental impact by swapping out plastic-heavy packaging for lighter, more easily recyclable options.

## Food waste reduction

Shelf-life extension through natural preservation is gaining interest due to its impact on food waste reduction and cost savings.<sup>14</sup>

<sup>9</sup> Market, F. (2023). Processed Meat Market Projected to Reach US\$ 634.5 billion by 2033, Fueled by Innovative Meat Preservation Techniques. [online] Available at: <https://www.globenewswire.com/en/news-release/2023/09/06/2737972/0/en/Processed-Meat-Market-Projected-to-Reach-US-634-5-billion-by-2033-Fueled-by-Innovative-Meat-Preservation-Techniques-Future-Market-Insights-Inc.html>

<sup>10</sup> Fortunebusinessinsights.com. (2020). Processed Meat Market Size, Growth Rate, Global Industry Trends, 2030. [online] Available at: <https://www.fortunebusinessinsights.com/industry-reports/processed-meat-market-100556>

<sup>11</sup> InspiraFarms. (2023). Emerging trends in cold chain within the meat industry. [online]. Available at: <https://www.inspirafarms.com/emerging-trends-in-cold-chain-within-the-meat-industry/>

<sup>12</sup> Ibid.

<sup>13</sup> Ibid.

<sup>14</sup> Foodingredientsfirst. (2023). Natural preservation: Food waste reduction and shelf-life extension targeted as consumers seek value for money. [online] Available at: <https://www.foodingredientsfirst.com/news/natural-preservation-food-waste-reduction-and-shelf-life-extension-targeted-as-consumers-seek-value-for-money.html>

# Market concentration and product complexity

## Market concentration.

A Shannon Entropy value of 4.61 in 2021 for processed meat, HS code 1602 – as stated in this study – suggests potentially the majority of exports from 24 countries.<sup>15</sup>

## Product complexity score.

According to the most recent complexity scoring,<sup>16</sup> processed meat garners a medium-low complexity on the HS4 level, which garners a middling complexity score of -0.11. This ranks the category 584th out of 1024 HS4 classifications.<sup>17</sup> Processed meat of bovine animals is the least complex in production at -0.98, while processed turkey and duck meats predominantly have the highest complexity at 0.29.

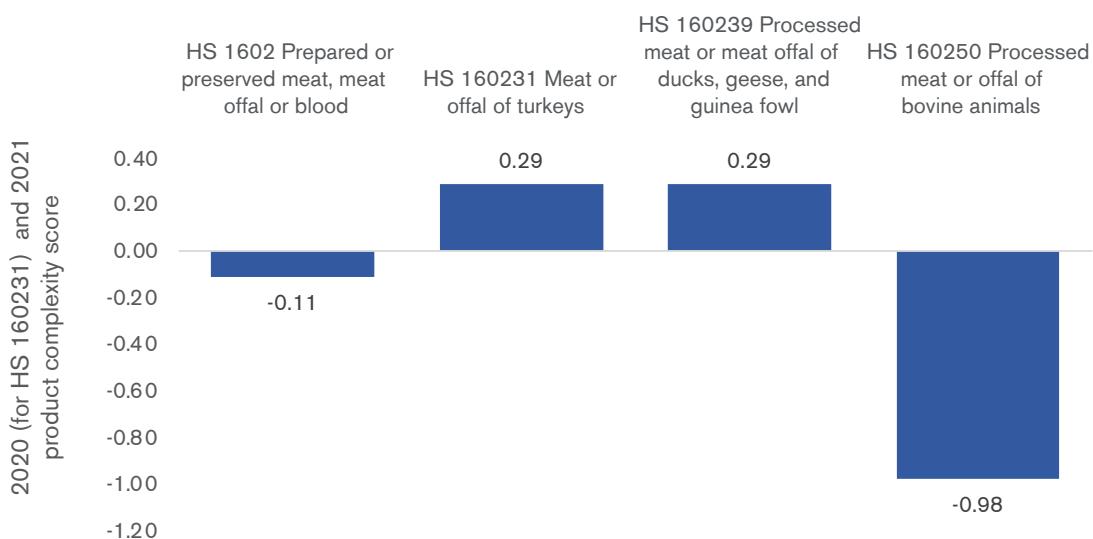


Chart 6 Processed meats complexity on the HS6 level in 2021

Regarding the Product Complexity Index (PCI) historical progress on the HS6 level, the overall PCI for HS 1602 has fluctuated slightly over the period, ranging from -1.07 to 0.16.<sup>18</sup> This suggests no significant shift in the overall complexity of the product category. At the category level, HS 160231, processed turkey has the highest and most stable PCI throughout the period, suggesting consistently higher complexity in production. On the other hand, HS 160250, processed bovine meat, has the lowest PCI.

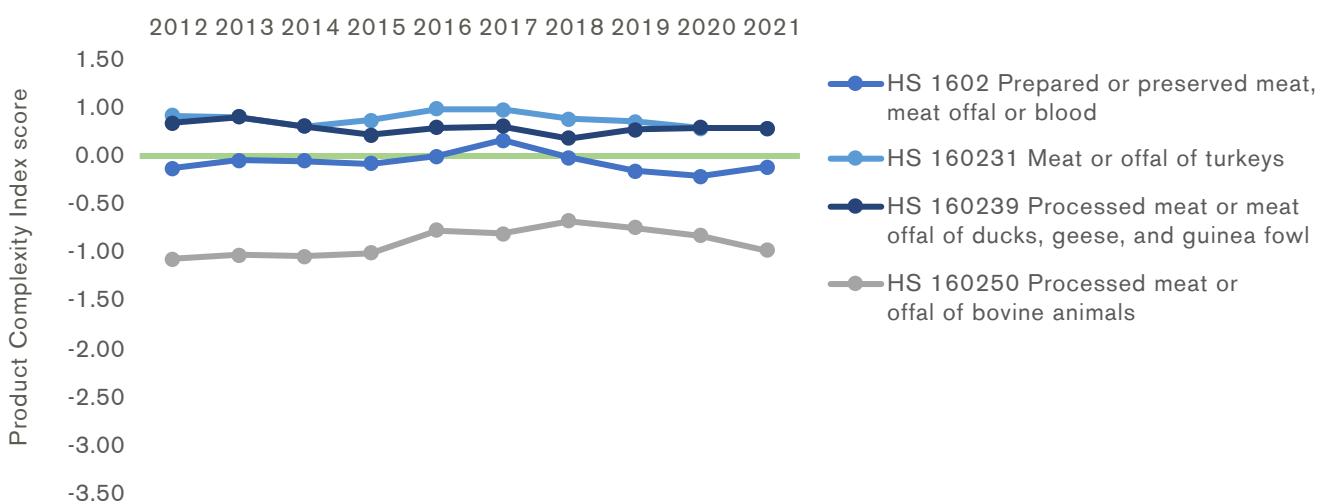


Chart 7 Processed meats product complexity 2012 to 2021

<sup>15</sup> OEC. (2021). Processed meat, meat offal or blood. [online] Available at: <https://oec.world/en/profile/hs/sausages>

<sup>16</sup> At the time of reporting, the most recent PCI score available for HS 160231 was for 2020.

<sup>17</sup> Ibid.

<sup>18</sup> Ibid.

# World trade statistics by Processed meat category on the HS6 level

Colour key
Jordan represents > 10% of 2022 world exports
Jordan represents > 1% and <5% of 2022 world exports
Jordan represents > 0% and <1% of 2022 world exports
Exports from Jordan not in evidence in 2022

HS Code	2022 world exports	2022 top export value and territory	2022 top import value and territory	Jordan 2022 export value	Jordan's share in global export markets
<b>HS 160210</b> 160210 Homogenised prepared meat, offal, blood or insects, put up for retail sale as infant food or for dietetic purposes, in containers of <= 250 g	\$75.7 million	\$18.9 million Czech Republic	\$12.2 million Slovakia	\$1.2 million	2%
<b>HS 160220</b> Preparations of liver of any animal	\$240.4 million	\$95.2 million Belgium	\$32.2 million United Kingdom	\$0	0%
<b>HS 160231</b> Meat or offal of turkeys	\$527.3 million	\$87.7 million Germany	\$58 million France	\$901,000	0.2%
<b>HS 160232</b> Meat or offal of fowls of the species "Gallus domesticus", prepared or preserved	\$10.3 billion	\$2.9 billion Thailand	\$2.4 billion Japan	\$614,000	0.01%
<b>HS 160239</b> Processed meat or meat offal of ducks, geese and guinea fowl of the species domesticus	\$834.8 million	\$208.2 million China	\$90.4 million Germany	\$211,000	0.03%
<b>HS 160241</b> Hams of swine and cuts thereof, prepared or preserved	\$1.3 billion	\$274.5 million Germany	\$292.5 million United Kingdom	\$0	0%
<b>HS 160242</b> Prepared or preserved shoulders and cuts thereof, of swine	\$255.2 million	\$108.6 million United States	\$505.1 million Japan	\$0	0%
<b>HS 160249</b> Processed meat and offal of swine	\$2.9 billion	\$575 million United States	\$393.2 million United Kingdom	\$0	0%
<b>HS 160250</b> Processed meat or offal of bovine animals	\$3.1 billion	\$765.2 million Brazil	\$742.7 million United States	\$50.9 million	1.6%
<b>HS 160290</b> Processed meat, offal, blood or insects	\$243.1 million	\$111.1 million United Arab Emirates	\$51.5 million Kuwait	\$2.9 million	1.2%

Table 1 Processed meat trade statistics and Jordan export market share

## HS 1602 in the context of Jordanian exports

Ranked 31st on the global market, Jordan emerged as a leading prepared/preserved meat exporter in the Middle East in 2022, with exports valued at US\$50.1 million, trailing only the United Arab Emirates and Turkey.<sup>19</sup> Notably, Jordan's total export value of preserved meat achieved a 9% CAGR between 2018 and 2022, from \$32.2 million to \$50.1 million.<sup>20</sup>

The dominant export category for Jordan's preserved meats was 'HS 160250, processed meat or offal of bovine animals (excl. sausages and similar products)', accounting for nearly 90% of HS 1602 export value. However, it saw a decline of approximately 9% compared to 2021 levels.<sup>21</sup>

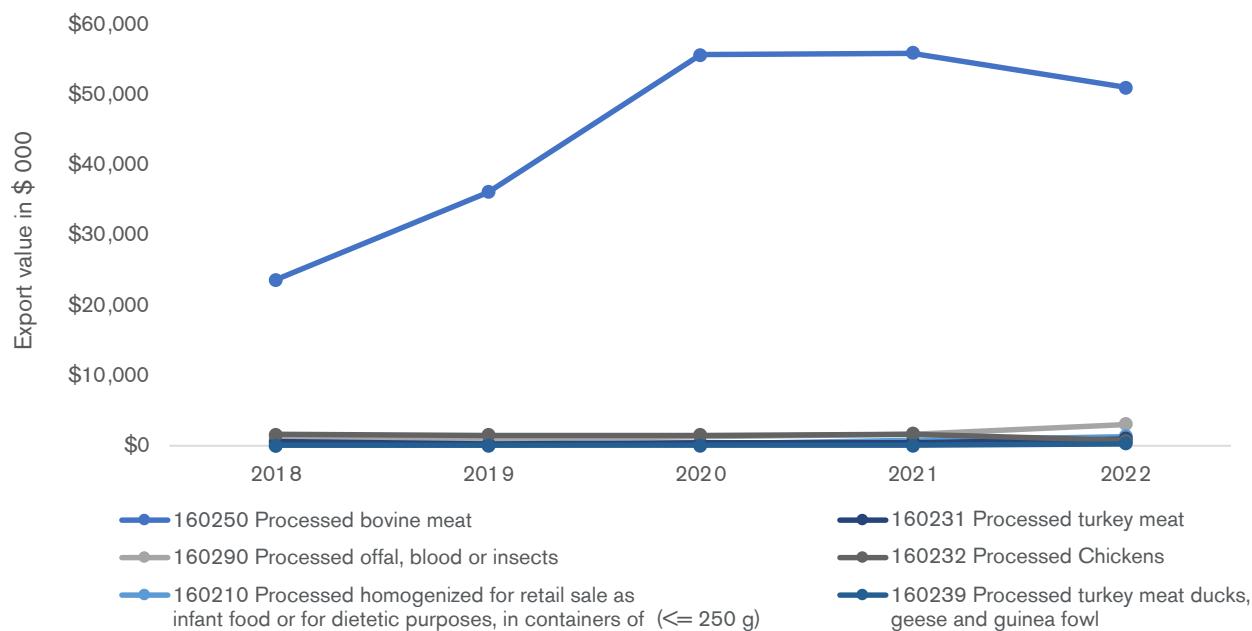


Chart 8 Jordan's processed meats exports by category in 2022, in '\$000

## Major markets for Jordan's processed meats HS 1602 exports 2018 to 2022

Between 2018 and 2022, the Gulf region emerged as the primary destination for Jordan's preserved meat exports, led by Saudi Arabia, contributing \$31.1 million in 2022.<sup>22</sup> This was followed by the United Arab Emirates with \$3.9 million and Qatar with \$3.4 million. Kuwait, Iraq, Bahrain, Oman and Lebanon also represent important markets for Jordan's preserved meat exports.

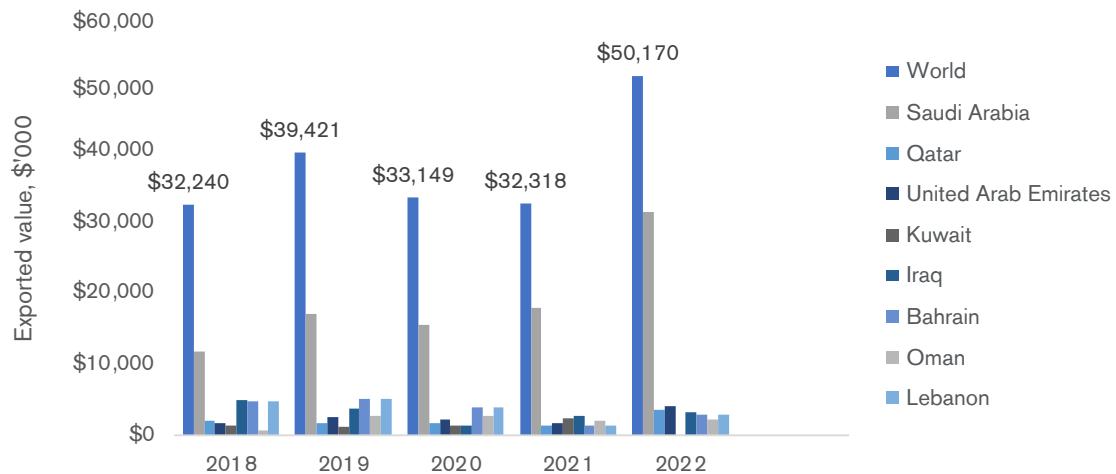
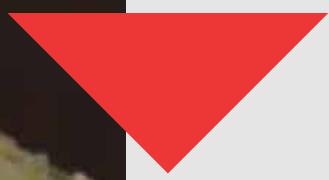


Chart 9 Jordan's leading processed meats markets by value, in '\$000

<https://v20.libid>

<sup>20</sup> Ibid.

<sup>22</sup> ITC (2022). Trade Map - List of importing markets for a product exported by Jordan (mirrored data). [online] Available at: [https://www.trademap.org/Country\\_SelProductCountry\\_TS.aspx?nvpm=1%7c400%7c%7c%7c1602%7c%7c%7c4%7c1%7c2%7c2%7c2%7c1%7c2%7c1%7c1%7c1](https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpm=1%7c400%7c%7c%7c1602%7c%7c%7c4%7c1%7c2%7c2%7c2%7c1%7c2%7c1%7c1%7c1)



## Priority markets

# 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>23</sup>

## Saudi Arabia's processed meat consumption

The average volume of processed meat consumed per person in Saudi Arabia has gradually decreased. Notably, there was a drop in annual per capita consumption from 6.5 kilograms in 2019 to 5.8 kilograms in 2020.<sup>24</sup> Since 2021, the average volume has remained around 5.2 kilograms per capita. The data also suggests that by 2028, the average yearly processed meat consumption per person in Saudi Arabia is expected to moderate to 5.1 kilograms.

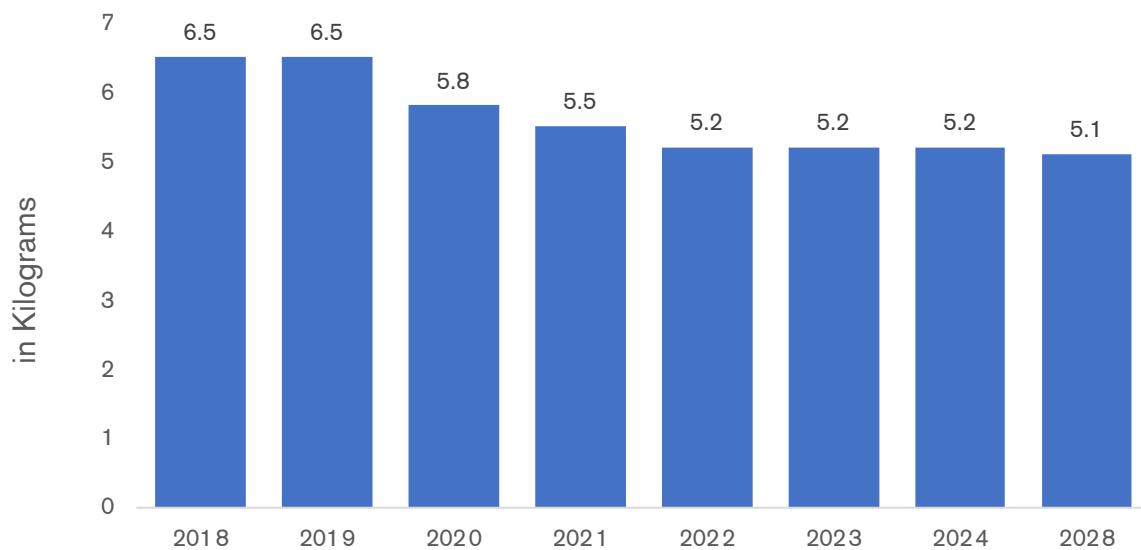


Chart 10 Saudi Arabia average volume per capita, 2018 to 2028 in kilograms

<sup>23</sup> IMF. (2023). Saudi Arabia: 2023 Article IV Consultation-Press Release.

<sup>24</sup> Statista. (2024). Processed Meat - Saudi. [online] Available at: <https://www.statista.com/outlook/cmo/food/meat/processed-meat/saudi-arabia>

## Saudi Arabia processed meats imports

Saudi Arabia's total imports of preserved meats have increased from \$82.1 million in 2018 to \$206 million in 2022, representing a growth of over 141%.<sup>25</sup> The United Arab Emirates remained the leading supplier throughout the period, accounting for 35% (equivalent to \$71.4 million) in 2022 of category imports, followed by Malaysia (\$64.2 million), and Jordan (\$31.1 million).

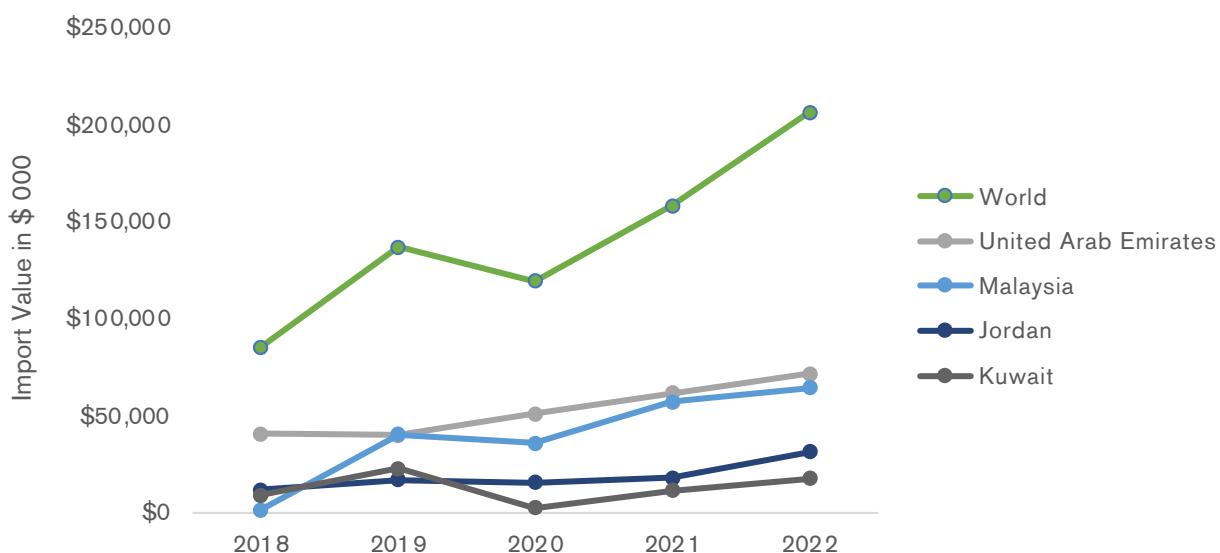


Chart 11 Saudi Arabia processed meats import values, top exporters, 2018 to 2022, in \$000

In 2022, the Saudi Kingdom's average import value for preserved meat stood at \$4,679 per ton.<sup>26</sup> However, prices across major supplying countries varied significantly, ranging from \$3,016 per ton for Kuwait to \$9,944 per ton for Canada. This trend held true over the 2018-2022 period, with Kuwait consistently offering the most affordable prices and Canada commanding the highest, although no imports from Canada were recorded in 2019.

Jordan's import values per ton ranged from \$4,446 in 2018 to \$4,390 in 2022, with an average of around \$4,454.

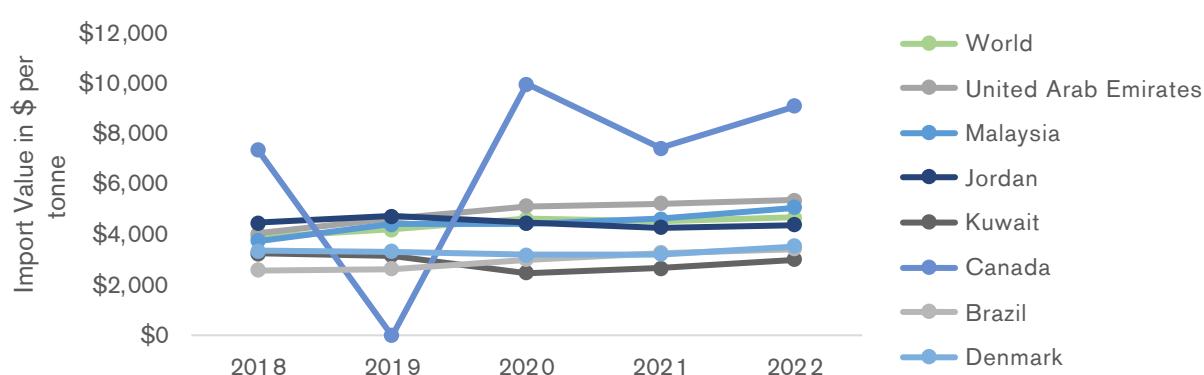


Chart 12 Saudi Arabia processed meats imports by territory, 2018-222, in \$ per ton

<sup>25</sup> ITC (2022). Trade Map - List of supplying markets for a product imported by Saudi Arabia. (Prepared or preserved meat, meat offal, blood or insects (excl. sausages and similar products, ...). [online] Available at:

[https://www.trademap.org/Country\\_SellProductCountry\\_TS.aspx?nvpml=1%7c682%7c%7c0%7c%7c1602%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c2%7c1%7c1%7c1%7c1](https://www.trademap.org/Country_SellProductCountry_TS.aspx?nvpml=1%7c682%7c%7c0%7c%7c1602%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c2%7c1%7c1%7c1%7c1)

26 *Ibid.*

## Saudi Arabia processed meats imports from Jordan

In 2022, Saudi imports of Jordanian preserved meats reached \$31.1 million, an increase of over 170% compared to 2018.<sup>27</sup> Drilling down to product categories, eat or offal of fowls of the species "*Gallus domesticus*", prepared or preserved – (HS 160232), took the top spot with an import value of \$26.9 million. This was followed by processed meat or offal of bovine animals – (HS 160232) at \$1.5 million.<sup>28</sup>

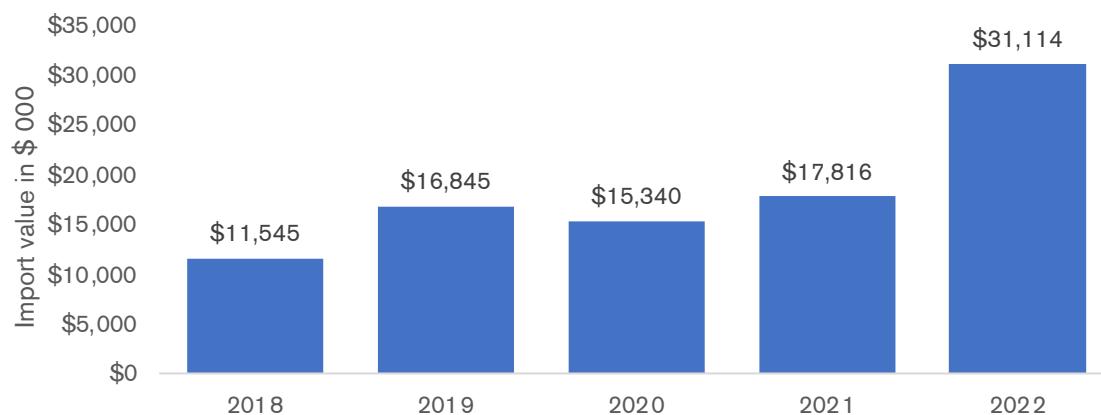


Chart 13 Saudi Arabia processed meats imports from Jordan, 2018-2022 in \$000

## Saudi Arabia's 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:

**Greater Arab Free Trade Area (GAFTA), 1997.** Saudi Arabia and Jordan are members of GAFTA, which was established under the umbrella of the Arab League. The agreement aims to create a free trade area among Arab countries by reducing and eliminating tariffs and trade barriers among member states. GAFTA includes 18 Arab countries and promotes increased trade and economic integration in the region

<sup>27</sup> ITC (2022). Trade Map - Existing and potential trade between Saudi Arabia and Jordan.. (Prepared or preserved meat, meat offal, blood or insects (excl. sausages and similar products, ...). [online] Available at:

[https://www.trademap.org/Bilateral\\_TS.aspx?nvpme=1%7c682%7c%7c400%7c%7c1602%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c1%7c1%7c1%7c1%7c1](https://www.trademap.org/Bilateral_TS.aspx?nvpme=1%7c682%7c%7c400%7c%7c1602%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c1%7c1%7c1%7c1%7c1)

<sup>28</sup> *Ibid.*,

[https://www.trademap.org/Bilateral\\_TS.aspx?nvpm=1%7c682%7c%7c400%7c%7c1602%7c%7c6%7c1%7c1%7c1%67c2%7c1%7c1%7c1%7c1%7c1](https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c682%7c%7c400%7c%7c1602%7c%7c6%7c1%7c1%7c1%67c2%7c1%7c1%7c1%7c1%7c1)

# 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 Jordan's most significant 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.

## Social

Saudi Arabia's ready-to-eat (RTM) sector lacks traditional outlets, but growth is evident in major cities like Jeddah & Riyadh. Consumer preference leans towards frozen RTMs for convenience, minimal nutritional loss, and extended shelf life, boosting demand for meat-based options across marketplaces.<sup>29</sup>

KSA's income growth, especially among young professionals and health-conscious families, drives demand for premium imported foods, influenced by shifting taste preferences towards healthy options.<sup>30</sup>

## Technology

Saudi Arabia's e-commerce boom is skyrocketing. Revenue is expected to hit \$13.7 billion by year-end 2023 and nearly double to \$23.5 billion by 2027, fuelled by a 14% annual growth rate. Over 34.5 million Saudis will be online shoppers by 2025, with e-commerce reaching nearly 75% of the population by 2027.<sup>31</sup>

## Environment

Saudi Arabia is exposed to several 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.

## Legal

All imported goods, including food and other products, must comply with strict technical regulations and standards set by the Saudi Standards and Metrology Organization (SASO).<sup>32</sup>

<sup>29</sup> Mordorintelligence.com. (2024). Saudi Arabia Ready Meals Market Trends. [online] Available at: <https://www.mordorintelligence.com/industry-reports/saudi-arabia-ready-meals-market-industry/market-trends>

<sup>30</sup> Baig, Mirza Barjees, et al. (2022). Food Waste in Saudi Arabia: Causes, Consequences, and Combating Measures. *Sustainability*, 14(16), 10362.

<sup>31</sup> Deloitte. (2023). Unlocking the eCommerce potential for Saudi Arabian SMEs in a post-Covid world. p.5. Available at:

[https://www2.deloitte.com/content/dam/Deloitte/xe/Documents/consumer-business/me\\_unlocking-eCommerce-potential-for-saudi-arabian-SMEs-in-a-post-Covid-world.pdf](https://www2.deloitte.com/content/dam/Deloitte/xe/Documents/consumer-business/me_unlocking-eCommerce-potential-for-saudi-arabian-SMEs-in-a-post-Covid-world.pdf)

<sup>32</sup> Trade.gov (2024). Saudi Arabia - Standards for Trade. [online] Available at: <https://www.trade.gov/country-commercial-guides/saudi-arabia-standards-trade#:~:text=SASO%20has%20specific%20requirements%20for,meet%20established%20shelf%2Dlife%20requirements>.

## Saudi Arabia processed meats suppliers and distributors

**Al Watania Poultry.**: A regional and global poultry leader with over 50 distribution channels and over 150 poultry products. The company manufactures, markets, and distributes fresh and frozen poultry products, including sausages. **Website:** <https://alwatania.sa/>

**Almunajem.**: Over 70 years of experience importing and distributing food in Saudi. They reach over 18,000 outlets with their extensive network of warehouses and partnerships with established international suppliers. **Website:** <https://almunajemfoods.com/about/>

**Lulu Group.**: A global player headquartered in Abu Dhabi, Lulu Group thrives on its diversified portfolio encompassing hypermarkets, malls, manufacturing, trading, hospitality, and real estate across 26 nations in the Middle East, Asia, the US, and Europe. **Website:** <https://www.lulugroupinternational.com/contact-us/>

**Nashar Trading Company.**: A leading importer, distributor and meat manufacturer company in Saudi Arabia that offers a variety of cold-cut meat delicacies, including mortadella, roast turkey breast, salami, and pizza beef toppings. **Website:** <http://www.nashar.com/>

**Sunbulah Group.**: One of the largest food manufacturing companies in Saudi Arabia. Their line of products includes frozen beef and lamb. **Website:** <https://www.sunbulahgroup.com/>

**Tanmiah.**: With over 3000 employees, 20 branches, and operations in seven countries, Tanmiah offers a wide range of products, including deli meats. **Website:** <https://tanmiah.com/index.php>

## Exhibitions and trade fairs in Saudi Arabia

Dates	Exhibition name	City	Country	Website
12 to 15 August 2024	Saudi Food Expo 2024	Riyadh	Saudi Arabia	<a href="https://www.saudifoodexpo.com/">https://www.saudifoodexpo.com/</a>
12 to 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% was estimated for 2023 in the United Arab Emirates, following a 7.4% growth in 2022.<sup>33</sup> Inflation is currently projected at 3.4%. The implementation of an IMF reform is further expected to limit medium-term growth.<sup>34</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 processed meat consumption

Despite fluctuations, the average annual processed meat consumption per capita in the United Arab Emirates has remained reasonably consistent over the years, ranging from 8.0 kilograms to 8.5 kilograms.<sup>35</sup> The projection for 2028 suggests a yearly per-person consumption of 8.2 kilograms.

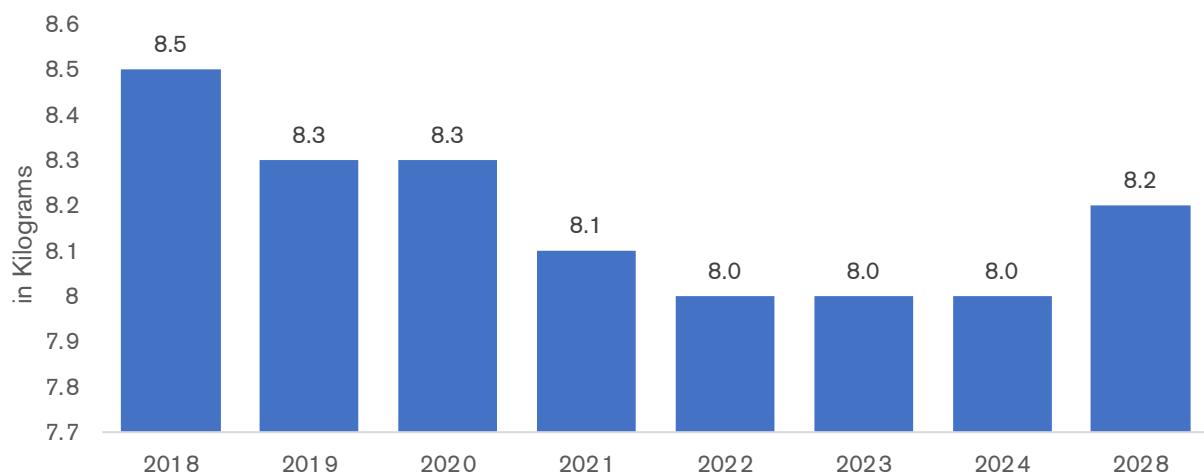


Chart 14 UAE average volume per capita, 2018 to 2028 in kilograms

<sup>33</sup> IMF. (2023). IMF Country Reports: United Arab Emirates.

<sup>34</sup> Ibid.

<sup>35</sup> Statista. (2024). Processed Meat – UAE. [online] Available at: <https://www.statista.com/outlook/cmo/food/meat/processed-meat/united-arab-emirates#revenue>

## United Arab Emirates processed meats imports

The United Arab Emirates' average total import value per ton for preserved meats remained relatively stable between 2018 and 2022, ranging from \$3,818 to \$4,650.<sup>36</sup>

Significant price variations exist among individual source countries. Jordan and France consistently command higher prices, exceeding \$5,000 per ton throughout the five years. Conversely, Brazil and China maintain the most stable and comparatively lower price points, ranging from \$2,924 to \$3,630 and \$2,813 to \$3,160 per ton, respectively.<sup>37</sup>

Saudi Arabia, a major supplier, exhibited price fluctuations between 2018 and 2020. In spite of this, per ton prices rose broadly from \$2,601 in 2018 to \$5,467 in 2022.<sup>38</sup> This suggests potential changes in the types or quality of preserved meat products being imported from Saudi Arabia over the period. While Saudi Arabia and South Africa experienced significant increases, Brazil and China maintained relative stability. Notably, the United States consistently commanded the highest price throughout the 2018 to 2022 period, with values ranging from \$5,650 to \$8,515. In contrast, China consistently offered the most affordable option, with import values per tonne between \$2,844 and \$3,197, making it the most budget-friendly supplier among the main eight supplier countries.

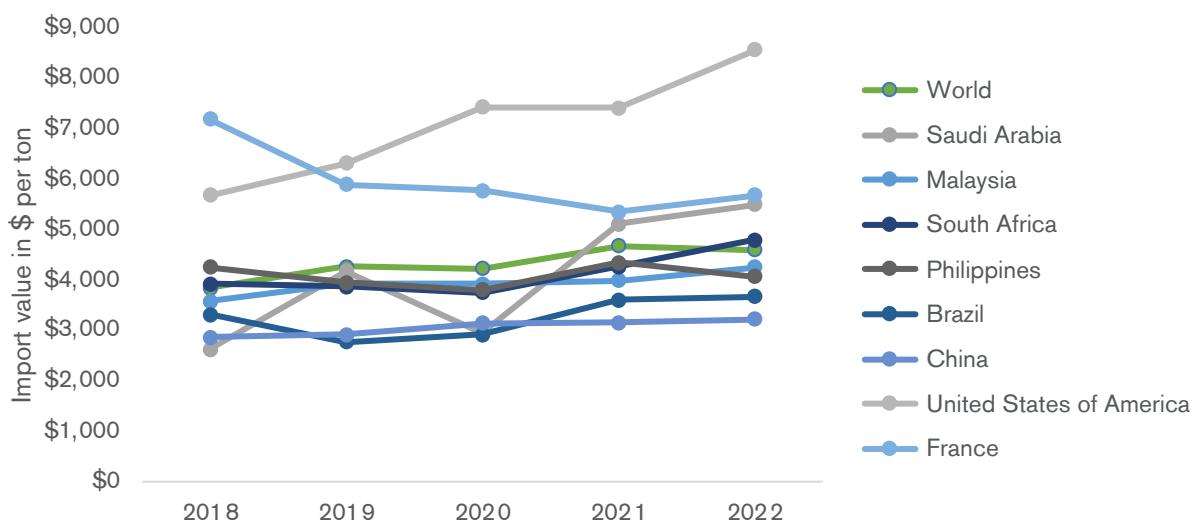


Chart 15 United Arab Emirates processed meats imports by territory, 2018-2022 in \$ per ton

The United Arab Emirates (UAE) witnessed an upward trend in overall preserved meat imports from 2018 to 2022, increasing from \$79.2 million to \$102.2 million.<sup>39</sup> Imports from Saudi Arabia exhibited a significant upward trajectory, growing from \$3.8 million in 2019 to \$24.0 million in 2022, reflecting a fivefold increase. While Southeast Asian suppliers like Malaysia (\$17.1 million in 2022) and the Philippines (\$6.8 million in 2022) maintained relatively stable or slightly increasing values, South Africa (\$7.1 million in 2022) and Brazil (\$6.5 million in 2022) exhibited moderate growth. Notably, imports from both China (\$6.3 million in 2022) and the United States (\$5.7 million in 2022) declined significantly during the analysed period. These contrasting trends suggest a diversification in the UAE's import sources, with a growing reliance on global suppliers and a stronger focus on Saudi Arabia, possibly due to geographic proximity and trade agreements. However, traditional suppliers from Southeast Asia and South America continue to hold a presence in the market.

<sup>36</sup> ITC (2022). Trade Map - List of supplying markets for a product imported by United Arab Emirates. (Prepared or preserved meat, meat offal, blood or insects (excl. sausages and similar products, ...). [online] Available at: [https://www.trademap.org/Country\\_SelProductCountry\\_TS.aspx?nvpml=1%7c784%7c%7c%7c%7c1602%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c2%7c3%7c1%7c1%7c1](https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpml=1%7c784%7c%7c%7c%7c1602%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c2%7c3%7c1%7c1%7c1)

<sup>37</sup> Ibid.

<sup>38</sup> Ibid.

<sup>39</sup> ITC (2022). Trade Map - List of supplying markets for a product imported by United Arab Emirates (Mirror). (Prepared or preserved meat, meat offal, blood or insects (excl. sausages and similar products, ...). [online] Available at: [https://www.trademap.org/Country\\_SelProductCountry\\_TS.aspx?nvpml=1%7c784%7c%7c%7c%7c1602%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c2%7c1%7c1%7c1%7c1](https://www.trademap.org/Country_SelProductCountry_TS.aspx?nvpml=1%7c784%7c%7c%7c%7c1602%7c%7c%7c4%7c1%7c1%7c1%7c2%7c1%7c2%7c1%7c1%7c1%7c1)

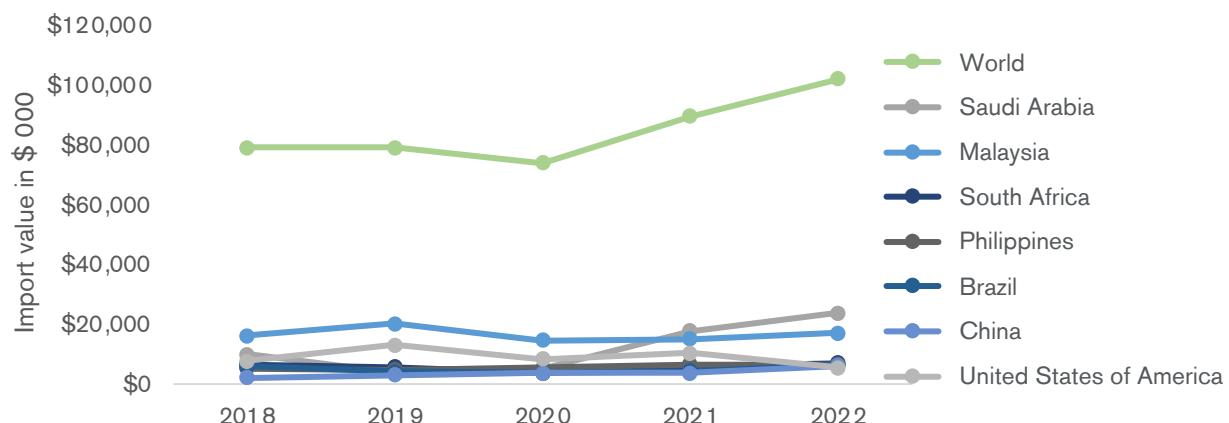


Chart 16 UAE processed meats import values, 2018 to 2022, in \$000

## United Arab Emirates processed meats imports from Jordan

In 2022, United Arab Emirates imports of Jordanian preserved meats reached \$3.9 million, a gain of approximately 147% compared to 2018.<sup>40</sup> Processed chicken meats (HS 160232) took the top spot with an import value of \$3 million. This was followed by 'processed meat of ducks, geese and the likes, in containers of a net weight of <= 250 g, as preparations of liver and meat extracts and juices' – (HS 160239) at \$ 421,000.<sup>41</sup>



Chart 17 United Arab Emirates processed meats imports from Jordan, 2018-2022, in \$000

## 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:

**Greater Arab Free Trade Area (GAFTA), 1997.** The United Arab Emirates and Jordan are members of GAFTA, which was established under the umbrella of the Arab League. The agreement aims to create a free trade area among Arab countries by reducing and eliminating tariffs and trade barriers among member states. GAFTA includes 18 Arab countries and promotes increased trade and economic integration in the region.

**Industrial Partnership for Sustainable Economic Growth, 2022.** Though not an agreement, this initiative has overseen deals of more than \$2 billion, and involves the UAE, Egypt, Bahrain, and Jordan. It aims to foster industrial cooperation in sectors such as agriculture, fertilisers, food, minerals, petrochemicals, pharmaceuticals and textiles.<sup>42</sup>

<sup>40</sup> ITC (2022). Trade Map - Existing and potential trade between United Arab Emirates and Jordan. (Prepared or preserved meat, meat offal, blood or insects (excl. sausages and similar products. ...)). [online] Available at:

<sup>41</sup> Ibid.,

<sup>42</sup> Jordan Times (Feb 26,2023) Prime Minister opens 3rd meeting of Higher Committee of Industrial Partnership in Amman:[online] Available at:

<https://jordantimes.com/news/local/pm-opens-3rd-meeting-higher-committee-industrial-partnership-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 with the Gulf Cooperation Council and 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, the 29th 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.

## 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 sizeable expatriate population, very good infrastructure, and high living standards.

## Technology

The UAE's burgeoning food tech sector, while buzzing with innovative solutions, faces a dynamic landscape shaped by policy tweaks, economic fluctuations, and evolving consumer preferences. Government support for sustainability and transparency initiatives intertwines with the rise of health-conscious diners demanding personalized experiences. Meanwhile, rapid technological advancements in everything from AI-powered kitchens to blockchain-backed traceability demand constant adaptation.

## Environment

Sustainable packaging solutions and waste management practices can be a competitive advantage, especially as the UAE tackles water scarcity and resource limitations. Moreover, capitalizing on the UAE's growing interest in sustainability by offering environmentally friendly products can unlock further market potential. By embracing an eco-conscious approach, Jordanian exporters can cater to evolving consumer preferences and secure a long-term niche in the UAE's food tech future.

## Legal

Strict import regulations, particularly around labelling and halal certification, demand meticulous compliance. Meeting the UAE's high food safety and hygiene standards is non-negotiable, while protecting intellectual property and adhering to ethical sourcing practices ensure a strong brand image.

## United Arab Emirates processed meats suppliers and distributors

**Lulu Group.:** A global player headquartered in Abu Dhabi, Lulu Group thrives on its diversified portfolio encompassing hypermarkets, malls, manufacturing, trading and hospitality, across 26 nations in the Middle East, Asia, US, and Europe. **Website:** <https://www.lulugroupinternational.com/contact-us/>

**Al Masa.:** Dubai-based meat processor acquired by Siniora in 2016, specialises in diverse individual quick freezing (IQF) chicken (breasts, wings, lollipops) and custom marinated/grilled/cooked chicken, beef, and turkey. **Website:** <https://www.almasadubai.com/>

**Al Islami Foods.:** Operating from Dubai, UAE, Al Islami Foods provides the region with premium halal meat and convenient frozen meals. Their two brands cater to diverse needs: Al Islami offers classic items like chicken, seafood, and vegetables, while Aladdin specializes in frozen food for children.

**Website:** <https://alislamifoods.com/>

**Freshly Frozen Foods.:** Freshly Frozen Foods is a leading UAE food service supplier renowned for its extensive portfolio of high-quality, innovative ingredients, including NO MDM (mechanically deboned meat) meats, seafood, and global flavours. Featuring two state-of-the-art processing units spanning 110,000 square feet, the company boasts four dedicated lines for poultry, seafood, vegetables, and meat, with an annual production capacity of 15,000 metric tons. **Website:** <https://freshlyfoodservice.com/index.php>

**Rastelli Foods Group/:** Established in 1976, Rastelli Foods Group delivers premium food and services to hotels, restaurants, institutions, and retail markets. They cater specifically to the Middle East with dedicated sales teams for both retail and food service needs. **Website:** <https://www.rastelliglobal.me/>

**Sadia.:** A leading name in frozen food and meat, Sadia caters specifically to the Middle Eastern market with a halal-certified range of products. **Website:** <https://www.sadia-life.com/en-ae>

## Exhibitions and trade fairs in the United Arab Emirates

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

# Kuwait

## Kuwait macroeconomic overview

Following 7.9% growth in 2022, fuelled by a 13.3% incline in the oil sector, Kuwait's economy experienced a sharp slowdown in 2023.<sup>43</sup> Holding steady around 3.7% for most of 2023, inflation likely stemmed from a mix of consumer spending, increasing housing costs, and ongoing supply chain disruptions. These factors are projected to ease in 2024, paving the way for inflation to cool down to an average of 2.5%.<sup>44</sup>

## Kuwait's processed meat consumption

The average annual processed meat consumption per capita has gradually decreased over the years, from 7.2 kilograms in 2018 to 6.0 kilograms in 2023.<sup>45</sup> The forecast for 2028 suggests that the consumption will remain stable at 6.0 kilograms.

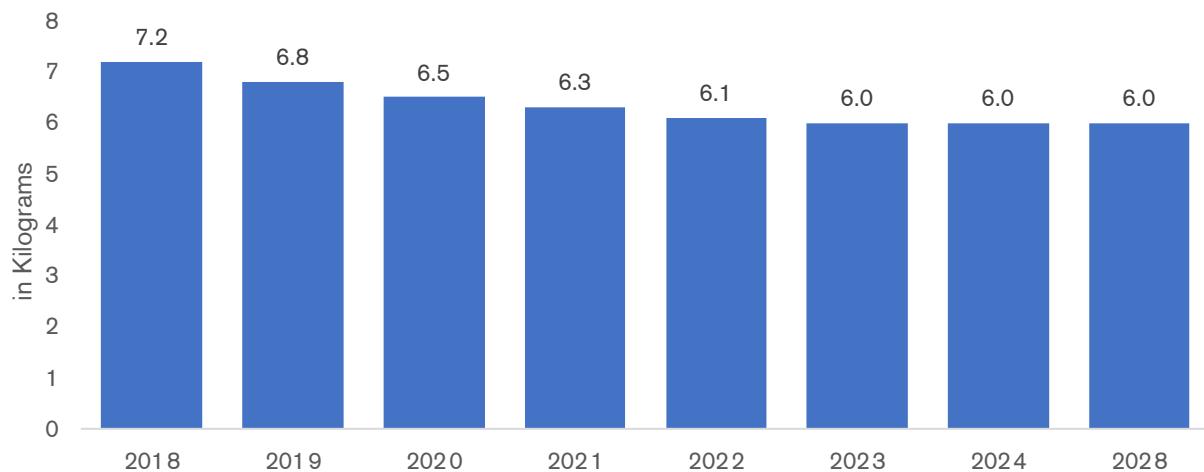


Chart 18 Kuwait average volume per capita, 2018 to 2028 in kilograms

<sup>43</sup> World Bank. (2023). Macro Poverty Outlook. [online] Available at: <https://thedocs.worldbank.org/en/doc/65cf93926fdb3ea23b72f277fc249a72-0500042021/related/mpo-kwt.pdf>

<sup>44</sup> NBK. (2023). Macro outlook: Kuwait.

<sup>45</sup> Statista. (2024). Processed Meat - Kuwait. [online] Available at: <https://www.statista.com/outlook/cmo/food/meat/processed-meat/kuwait>

## Kuwait processed meats imports

A general downward trend emerges, suggesting increased competition and market adjustments impacting pricing strategies. The UAE maintained stable prices around \$4,000-\$5,000 per ton, while the "World" category averaged \$4,500-\$5,000 per ton, with a moderate decline over time.<sup>46</sup> Significant price drops were observed for Brazil (reaching \$2,520 in 2021) and the US (dropping to \$2,265 in 2021). Saudi Arabia ranged from \$6,000-\$6,600 per ton, Malaysia averaged around \$4,000 with slight fluctuations, and Turkey hovered around \$4,600-\$5,000 with some variations. Egypt and Jordan maintained stability at around \$6,000 and \$5,500 per ton, respectively, while Denmark exhibited a slight upward trend from \$3,500 in 2017 to \$3,800 in 2021.

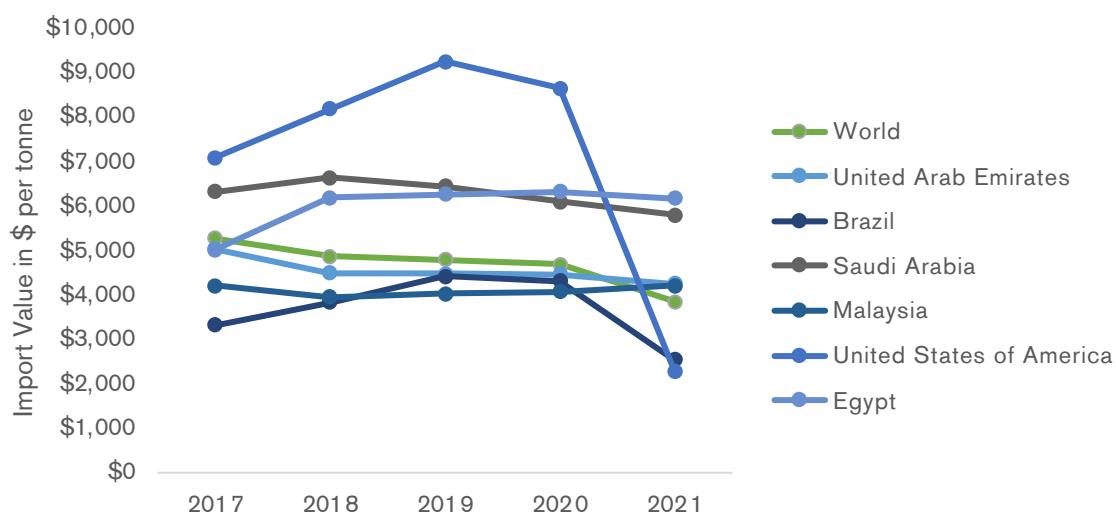


Chart 19 Kuwait processed meats imports by territory, 2017-2021 in \$ per ton

Kuwait's imports of preserved meat witnessed a significant upward trend from 2017 to 2021, nearly doubling from \$71.5 million to \$138.6 million.<sup>47</sup> While the UAE remained the most prominent source with consistent imports around \$68-69 million, Saudi Arabia and Egypt exhibited fluctuations. Notably, Brazil emerged as a major player in 2021, with imports reaching \$22.3 million, reflecting a nearly 30-fold increase since 2017. Meanwhile, traditional suppliers like Malaysia slightly recovered in 2021, while the US presence remained stable. These contrasting trends suggest a diversification in Kuwait's import sources, with a growing reliance on global suppliers and an evolving landscape among regional players.

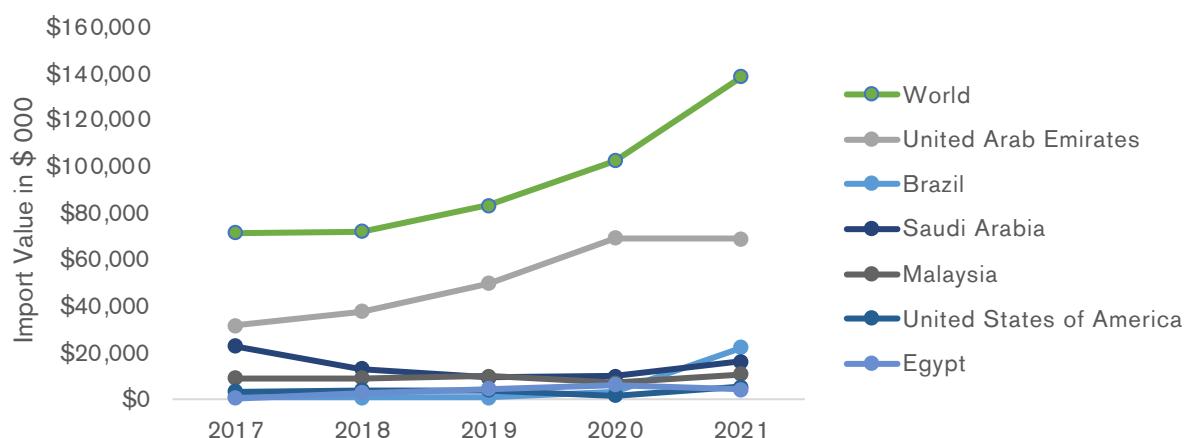


Chart 20 Kuwait processed meats import values, 2018 to 2022, in \$000

<sup>46</sup> ITC (2022). Trade Map - List of supplying markets for a product imported by Kuwait. (Prepared or preserved meat, meat offal, blood or insects (excl. sausages and similar products, ...). [online] Trademap.org. Available at:

[https://www.trademap.org/Country\\_SelProductCountry\\_TS.aspx?vpnm=1%7c414%7c%7c%7c%7c1602%7c%7c%7c%7c1%7c1%7c2%7c1%7c2%7c1%7c1%7c1](https://www.trademap.org/Country_SelProductCountry_TS.aspx?vpnm=1%7c414%7c%7c%7c%7c1602%7c%7c%7c%7c1%7c1%7c2%7c1%7c2%7c1%7c1%7c1)

<sup>47</sup> Ibid.

## Kuwait processed meats imports from Jordan

In 2021, Kuwait's imports of Jordanian preserved meats reached \$2.2 million, a gain of approximately 65% compared to 2021.<sup>48</sup> Within the product categories, processed chicken in containers of a net weight of  $\leq 250$  g, as preparations of liver and meat extracts and juices (HS 160232), took the top spot with an import value of \$1.4 million. This was followed by turkey meat, in containers of a net weight of  $\leq 250$  g, (HS 160231) at US\$ 324,000.<sup>49</sup>

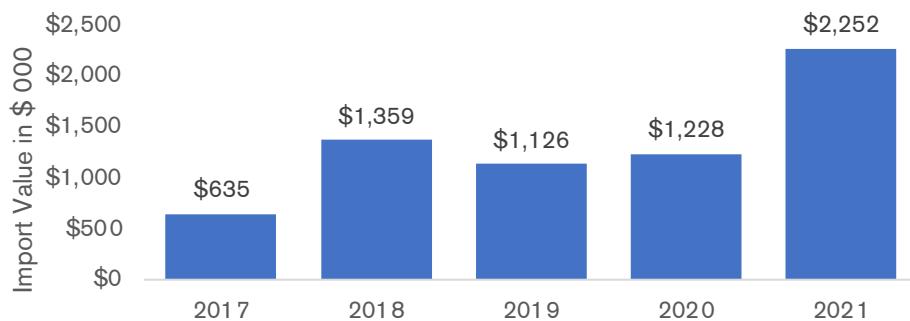


Chart 21 Kuwait preserved meats imports from Jordan

## Kuwait's trade agreements with Jordan

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

**Greater Arab Free Trade Area (GAFTA), 1997.** Kuwait and Jordan are members of GAFTA, which was established under the umbrella of the Arab League. The agreement aims to create a free trade area among Arab countries by reducing and eliminating tariffs and trade barriers among member states. GAFTA includes 18 Arab countries and promotes increased trade and economic integration in the region

<sup>48</sup> ITC. (2022). Trade Map - Existing and potential trade between Kuwait and Jordan. (Prepared or preserved meat, meat offal, blood or insects (excl. sausages and similar products, ...). [online] Available at: [https://www.trademap.org/Bilateral\\_TS.aspx?nvpm=1%7c414%7c%7c400%7c%7c1602%7c%7c%7c6%7c1%7c1%7c1%7c2%7c1%7c1%7c1%7c1%7c1%7c1](https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c414%7c%7c400%7c%7c1602%7c%7c%7c6%7c1%7c1%7c1%7c2%7c1%7c1%7c1%7c1%7c1%7c1)

<sup>49</sup> Ibid.

# Kuwait PESTEL analysis

## Politics

Ruled by the Al Sabah family, Kuwait enjoys political stability and strong trade ties, especially with the US and GCC. While its business environment lags behind its GCC peers (83rd in World Bank rankings), Vision 2035 aims to make it a regional financial and commercial hub by 2035.<sup>50</sup>

## Economics

Kuwait's economy experienced significant growth in 2022, with its annual GDP reaching 8.9%. This led to a substantial increase in GDP per capita, which rose to US\$41,000, up 28% from the previous year. However, inflation also rose, with consumer prices increasing by 4% annually.<sup>51</sup>

## Social

The inflow of expatriates to Kuwait has steadily increased over the years. As of 2018, expatriates account for 70% of the total Kuwaiti population of 4.6 million, compared to 62% in the year 2000.<sup>52</sup> This demographic shift has significant implications for Kuwait's market dynamics, consumer behaviour, and cultural landscape.

Urban areas house 98% of Kuwait's consumers, and their shopping preferences predominantly revolve around hypermarkets and supermarkets.<sup>53</sup> Additionally, Kuwait faces significant obesity levels, which have sparked an interest in healthy eating. The demand for nutritious products and those providing wellness benefits is on the rise, with a particular focus on protein-based offerings.<sup>54</sup> Additionally, the busy lifestyle in Kuwait emphasizes the need for convenient food options.

## Technology

The e-commerce market in Kuwait is witnessing substantial growth due to increased internet penetration and a high demand for internet-related services and smartphones. Moreover, As online food ordering becomes increasingly popular, enhanced delivery methods—including acceptance of digital payments, swift order fulfilment, promotional deals, and the use of insulated heat bags—are capturing customer interest.

## Environment

Kuwait is at significant risk of food insecurity because it lacks self-sufficiency and heavily depends on food imports due to its limited agricultural production.

## Legal

Despite favouring a free market, Kuwait restricts foreign company ownership, usually requiring a majority Kuwaiti stake (51%).<sup>55</sup> This can present challenges for foreign investors. Additionally, the country has a complex and bureaucratic regulatory environment affects the ease of doing business and foreign investment. Furthermore, Kuwait has strict food safety and quality standards, as well as halal certification requirements, for meat and poultry products. These regulations can add layers of complexity for businesses operating in the food and beverage industry.<sup>56</sup>

<sup>50</sup> World Bank. State of Kuwait. World Bank Country Engagement Framework 2021 – 2025. [online] Available: <https://thedocs.worldbank.org/en/doc/06a7eba0bc51a01f8b1e4ba80be0bcd-0280012021/original/KuwaitCEF-2021-2025-Final-English.pdf>

<sup>51</sup> World Bank Open Data. (2022). World Bank Open Data. [online] Available at: <https://data.worldbank.org/country/kuwait>

<sup>52</sup> Gulf Bank/ (2020). The Expat Debate in Kuwait: A Balancing Act in which Technology and Skills form the Key to the Solution. [online] Available at: <https://e-gulfbank.com/media/1ef0bc98b2e3ccbd456c571e2040c595.pdf>

<sup>53</sup> Export Connect. (2019). Tasty trends in Kuwait. [online] Available at: <https://exportconnect.com.au/tasty-trends-in-kuwait/>

<sup>54</sup> Ibid.

<sup>55</sup> PWC. (2024). Doing Business in Kuwait 2024 A Tax and Legal Guide. [online] Available at: <https://www.pwc.com/m1/en/tax/documents/doing-business-guides/dbku.pdf>

<sup>56</sup> USDA. (2024). Kuwait | Food Safety and Inspection Service. [online] Available at: <https://www.fsis.usda.gov/inspection/import-export/import-export-library/kuwait>

## Kuwait processed meats suppliers and distributors

**Al Mawashi.**: A prominent supplier based in Kuwait specialises in providing fresh, chilled, frozen, and processed food. Their product range includes various processed and marinated meat products.

**Website:** <https://almawashi.com.kw/services/food-service>

**Americana**: The Kuwait Food Company, known as the Americana Group, is a Kuwaiti food company headquartered in Sharjah City. It operates food products throughout the Middle East and North Africa region.

**Website:** <https://www.americanafoods.com/>

**Gulf Resources.**: A well-established foodstuff and consumer goods seller and distributor in Kuwait operates with a fleet of over 60 experienced sales personnel. They are supported by 30 well-equipped chilled and frozen distribution facilities. **Website:** <https://www.grtc.co/about.html>

**KIFCO.**: Established in Kuwait, KIFCO boasts over 30 years of experience in food manufacturing and production, serving the Kuwaiti market. **Website:** <https://kifcostore.com/>

**Khazan.**: Spanning the Middle East, Africa, and North Africa, Khazan's cutting-edge meat production boasts over 200 frozen and 120 chilled unique products, catering to diverse consumer preferences.

**Website:** <https://khazanarabia.com/>

**Lulu Group.**: A global player headquartered in Abu Dhabi, Lulu Group thrives on its diversified portfolio encompassing hypermarkets, malls, manufacturing, trading and hospitality, across 26 nations in the Middle East, Asia, US, and Europe. **Website:** <https://www.lulugroupinternational.com/contact-us/>

**Sadia.**: A leading name in frozen food and meat, Sadia caters specifically to the Middle Eastern market with a halal-certified range of products. **Website:** <https://www.sadia-life.com/en-ae>

**Seara.**: A leading chicken and beef producer with a growing global presence. The company manufactures, markets, and distributes frozen products, including sausages, minced meat, and burgers.

**Website:** <https://www.searafoodsme.com/>

## Exhibitions and trade fairs in Kuwait

Dates	Exhibition name	City	Country	Website
15 to 16 December 2024	Kuwait International Agro Food Expo	Kuwait	Kuwait	<a href="https://www.kuwait-food.com/">https://www.kuwait-food.com/</a>



## Recommendations

## Recommendations in summary

Jordanian processed meat exporters may find good opportunities in the priority Gulf markets. Saudi Arabia, the United Arab Emirates, and Kuwait offer strong potential driven by several converging factors, in spite of the forecast for reduced per capita consumption. Saudi Arabia and the United Arab Emirates, in particular, offer lucrative markets underpinned by growing populations, rising disposable incomes, lifestyle changes that are more dependent on convenience foods and, in the case of the United Arab Emirates and Saudi Arabia at least, significant tourism sectors.

Jordan's proximity to these markets offers a logistical advantage, potentially lowering transportation costs compared to distant suppliers. Equally, preferential trade agreements defined through GAFTA offer Jordanian exporters preferential administrative and cost customs advantages, enhancing their competitiveness.

Beyond meeting regulatory requirements, Jordanian exporters should adapt their offerings to specific preferences within each Gulf market. This includes tailoring products to local tastes, considering price sensitivities, and identifying suitable distribution channels. By understanding and addressing these nuances, Jordanian exporters can effectively capitalise on the promising prospects in the Gulf region.

Finally, a national traceability system would significantly benefit Jordanian exporters, targeting developed markets and the Gulf region. Like the demands of the USA and EU, GCC markets increasingly prioritise product quality, safety, and transparency. A robust traceability system would ensure Jordan is well-positioned to meet these requirements. Such a system would build trust, facilitate market access, and ultimately enhance the competitiveness of Jordanian preserved meats across a broader range of export markets.



## Reference information

# Priority markets tariff and non-tariff barriers

## Saudi Arabia

### Tariffs

For HS 1602 – Processed meat, offal or blood-based on these products, a preferential tariff of 0% and MFN duties of 5% apply to Jordan.

### General requirements

- Food laws are established within the GCC Gulf Standardization Organization (GSO) and adopted by participating member countries.
- All shipments of sheep, goats, cows, calves, and poultry—whether chilled, frozen, or canned—along with their products and preparations must adhere strictly to the approved Gulf Standards. These standards cover aspects such as fresh meat quality, chilling and freezing requirements, good hygienic practices, and compliance with Islamic provisions for animal slaughter. Additionally, the imported meat and poultry must be accompanied by a Halal certificate, ensuring that the slaughter occurs in a licensed facility according to Islamic Law provisions.
- GSO member countries, including Saudi Arabia, require that labels of pre-packaged food products include both production and expiration dates printed on the label prior to export. The labelling guidelines cover the following:
  - SASO Standards Adherence:
    - If the product aligns with a Saudi Standards, Metrology and Quality Organization (SASO) standard, follow the corresponding SASO labelling/marketing requirements.
    - If no SASO standard applies, but an applicable regional or international standard exists (e.g., IEC, ISO, GSO, EN, ASTM), adhere to that standard's labelling/marketing requirements.
  - Language Requirements:
    - Markings can be in either Arabic or English.
    - Warnings and safety instructions must be in Arabic or both Arabic and English.
    - Instruction manuals or pamphlets should be in Arabic or both Arabic and English.
  - Container Markings:
    - All containers should display the gross weight and either the initials or name of the consignee.
    - If multiple containers are part of a consignment, number them consecutively.
  - Country of Manufacture:
    - Containers should be marked to indicate the country of manufacture (e.g., “Made in Jordan”).
- When importing food to Saudi Arabia, specific documents are required for customs clearance at the port of entry. These include:
  - Customs declaration (bill of entry)
  - Copy of certificate of origin
  - Copy of commercial invoice
  - Copy of packing declaration & packing List
  - Copy of the bill of lading
  - Copy of health certificate
  - Certificate of conformity (COC)

## Additional detail

Further details on the KSA's import requirements for food can be found in the following references:

### **GCC.** GCC Guide For Control On Imported Foods

Link: [https://members.wto.org/crnattachments/2017/SPS/OMN/17\\_0111\\_00\\_e.pdf](https://members.wto.org/crnattachments/2017/SPS/OMN/17_0111_00_e.pdf)

### **SFDA.** Conditions & Requirements for Importing Food to the Kingdom of Saudi Arabia.

Link: <https://sfda.gov.sa/sites/default/files/2022-03/SFDAFood4654E.pdf>

### **SFDA.** Food Clearance Conditions and Requirements

Link: [https://www.sfda.gov.sa/sites/default/files/2021-11/SFADFgdfg\\_1.pdf](https://www.sfda.gov.sa/sites/default/files/2021-11/SFADFgdfg_1.pdf)

### **Global Trade Help Desk**

Link: <https://globaltradehelpdesk.org/en>

### **ITC Market Access Map**

Link: <https://www.macmap.org/>

### **US Trade.gov.** Labeling/Marking Requirements

Link: <https://www.trade.gov/country-commercial-guides/saudi-arabia-labelingmarking-requirements>

# The United Arab Emirates

## Tariffs

For HS 1602 – Processed meat, offal or blood-based on these products, a preferential tariff of 0% and MFN duties of 5% apply to Jordan.

## General requirements

- Food laws are established within the GCC Gulf Standardization Organization (GSO) and adopted by participating member countries.
- As per the unified GCC Guide, importers must submit the original invoice and certificate of origin alongside their single customs declaration. However, goods in transit are exempt from this documentation requirement.
- While the UAE has unified customs procedures, individual emirates manage their implementation, resulting in variations in the specific systems used. Dubai and Abu Dhabi, which handle the bulk of imports, have embraced fully operational paperless electronic systems. Dubai Customs utilizes Mirsal 221, offering 24/7 electronic document submission, clearance, payment, and risk assessment integrated with domestic, regional, and international authorities. Similarly, Abu Dhabi employs the Dhabi system across its customs centers, enabling electronic clearance, payments, declaration archiving, approval, and authorizations.
- Compliance with labelling requirements is a critical yet often challenging aspect of exporting to the UAE. Arabic is the primary language for food labelling, with any additional languages permitted only as supplementary. Mandatory information for pre-packaged foods includes product name, ingredient list (descending weight order), food additives, manufacturer/packer details, production date, and storage instructions.

## Additional detail

Further details on the United Arab Emirates import requirements for food can be found in the following references:

**GCC. GCC Guide For Control On Imported Foods**

Link: [https://members.wto.org/crnattachments/2017/SPS/OMN/17\\_0111\\_00\\_e.pdf](https://members.wto.org/crnattachments/2017/SPS/OMN/17_0111_00_e.pdf)

**Food Safety Department Dubai Municipality. Food Code 2020**

Link: <https://www.dmc.gov.ae/wp-content/uploads/2020/11/Food-Code-2.0-Draft-Version-4.pdf>

**Abu Dhabi Food Control Authority. General Food Labelling Requirements**

Link:

<https://www.adafsa.gov.ae/English/PolicyAndLegislations/Guidelines/Documents/General%20Food%20Labelling%20Requirements%20cop.pdf>

**Europe Direct. The Food and Beverage Market Entry Handbook: United Arab Emirates (UAE): a Practical Guide to the Market in the UAE for European Agri-food Products**

Link: [https://www.flandersinvestmentandtrade.com/export/sites/trade/files/market\\_studies/Market%20Entry%20Food%20and%20Beverage%20UAE.pdf](https://www.flandersinvestmentandtrade.com/export/sites/trade/files/market_studies/Market%20Entry%20Food%20and%20Beverage%20UAE.pdf)

**USDA. Food and Agricultural Import Regulations and Standards Country Report. United Arab Emirates**

Link:

[https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20Country%20Report\\_Dubai\\_United%20Arab%20Emirates\\_TC2022-0009.pdf](https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20Country%20Report_Dubai_United%20Arab%20Emirates_TC2022-0009.pdf)

**Global Trade Help Desk**

Link: <https://globaltradehelpdesk.org/en>

**ITC Market Access Map**

Link: <https://www.macmap.org/>

# Kuwait

## Tariffs

For HS 1602 – Processed meat, offal or blood-based on these products, a preferential tariff of 0% and MFN duties of 5% apply to Jordan.

## General requirements

- As a member of the GCC, Kuwait adopts the GSO standard on labelling of pre-packaged foods, the GSO standard 150-1/2013 on product expiry dates.
- Licenses. Importers in Kuwait must obtain import licenses from the Ministry of Commerce and Industry and be registered with the Kuwait Chamber of Commerce and Industry (KCCI). These licenses are valid for one year, can be renewed, and allow multiple shipments.
- Documentation. When importing goods to Kuwait, it is essential to follow specific documentation procedures. These include providing a commercial invoice, certificate of origin, packing list, and a bill of lading or airway bill for all commercial shipments.

## Additional detail

Further details on Kuwait's import requirements for processed meat can be found in the following references:

**US International Trade Administration.** Kuwait - Country Commercial Guide

Link: <https://www.trade.gov/country-commercial-guides/kuwait-import-requirements-and-documentation>

**Global Trade Help Desk**

Link: <https://globaltradehelpdesk.org/en>

**ITC Market Access Map**

Link: <https://www.macmap.org/>

**GSO.** Expiry periods of food products

Link: [https://micor.agriculture.gov.au/Dairy/Documents/Pdfs/GSO\\_FDS\\_150-1\\_2013\\_Expiry\\_periods\\_for\\_food\\_products\\_Part\\_1.pdf](https://micor.agriculture.gov.au/Dairy/Documents/Pdfs/GSO_FDS_150-1_2013_Expiry_periods_for_food_products_Part_1.pdf)

# 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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