

Gulf Cooperation Council (GCC)

Largest economic group in the Middle East and 11th-largest economy in the world.

Population

57.6
million

Average age

30
years

Plant-based
meat sales
projected growth
by 2034 (USD)

924.2
million

Expected CAGR
between 2026-2034



11.13%

01 Market size

- The plant-based meat market in the Gulf Cooperation Council (GCC) is estimated to be [USD 357.6 Million in 2025](#). Looking forward, the market is estimated to reach USD 924.2 Million by 2034, exhibiting a growth rate (CAGR) of 11.13% during 2026-2034.
- Saudi Arabia and the United Arab Emirates (UAE) possess the largest populations and contribute significantly to the region's GDP.

02 Consumer profile and demand

- A substantial percentage of the population consists of expatriates and residents from diverse international backgrounds, with the UAE, Qatar, and Kuwait's immigrant populations exceeding 70%.
- [A study by Ventures Middle East](#) found that 56 per cent of F&B consumers in the GCC are demanding plant-based options, spurring local innovation and product development. The pandemic reinforced trends in healthy eating, leading to a sustained shift towards plant-based, flexitarian, and vegan diets.
- Governments in the Middle East are increasingly promoting plant-based diets as part of their health and sustainability agendas. For instance, the UAE's National Food Security Strategy aims to increase the availability of plant-based foods by 35% in future.

03 Product formats in the market

By protein type

- Unlike the West, poultry represents the predominant meat consumed in the GCC.
- Islamic dietary laws prohibit the sale and consumption of pork in the majority of GCC member states.
- Exemptions exist within the UAE and Bahrain, where non-Muslims are legally permitted to consume pork.

By format

- Western formats such as burger patties, sausages, nuggets, and mince are popular choices among the rising youth population.
- Adapting to local cuisines is the [biggest need gap](#) in the plant-based meat market in GCC. Recognising the importance of traditional flavours, some companies have developed plant-based versions of regional dishes such as kebabs, koftas, shawarma, shish tawook, kibbeh, and kabsa, among others.
- Halal certification is mandatory for market entry in this region. While vegan ingredients are inherently halal, plant-based meat manufacturers are increasingly pursuing halal certification to enhance consumer confidence among Muslim demographics. For instance, Beyond Meat secured halal certification prior to distributing its products in the Middle East.
- Conversely, any food product, ingredient, or additive containing or produced using alcohol is considered haram and is unsuitable for consumption or use.

04 Key players in the market

- Many prominent international brands distribute their products within the GCC region. Some of the key brands include **Beyond Meat**, **Impossible Foods**, **Green Leaf**, **Vivera** and the **Meatless Farm Co.**, etc.
- Local brands include **THRYVE (by IFFCO)**, **Switch Foods**, **Al Islami**, **Nabati**, and **Al Kabeer**.
- Based in the UAE, **IFFCO** operates the GCC's first large-scale plant-based meat factory. Its fava-bean-based range includes burgers, mince, shawarma, and nuggets. Thryve's products are available in major hypermarkets across Saudi Arabia and the UAE.
- Based in Abu Dhabi, **Switch Foods** produces plant-based kebabs, koftas, soujouks, mince, and burger patties.
- Founded in 2020, **Arlene** specialises in frozen ready-to-eat vegan meals that incorporate meat analogues, offering dishes like kebabs, kibbehs, gyozas, dan dan noodles, spring rolls, spaghetti bolognese, and chilli con carne.
- Launched in 2024 as a subsidiary of Food Specialties Limited, Dubai-based **Nadura** offers clean-label meat-free proteins made from Canadian peas, including frozen burgers, mince, and kebabs. Their products are currently available online at Elfab in the UAE, with plans to expand into the food service and hospitality sectors.

05 Key channels

Retail

- The key grocery formats in the GCC region are primarily supermarkets, hypermarkets, and increasingly, discount grocery stores, with a growing trend towards online grocery delivery services.
- Traditional markets, known as souks, retain relevance in specific locales, particularly for the acquisition of fresh produce and regional culinary specialities.
- In the UAE, hypermarkets and supermarkets constitute the majority market share, representing approximately 85% of total consumer expenditure. The e-commerce segment, while experiencing rapid expansion, currently accounts for

approximately 15% of the market. Leading entities within this sector include **Carrefour, Lulu Hypermarket,** and **Spinneys,** each operating an extensive network of outlets across the nation. Additional prominent retail formats include **Choitrams, Union Coop, Al Maya, Viva, West Zone, Zoom, Geant,** and **Waitrose.**

- The Saudi Arabian food and grocery retail market is primarily controlled by a consortium of major enterprises, encompassing both domestic retailers and international chains. Key market participants include **Al Othaim Markets, Carrefour, Panda Retail, Lulu, Tamimi, Farm Superstores, Al Raya, Bin Dawood,** and **Danube,** among others.

Food service

- QSRs, cafes and bars, followed by FSRs are the most popular formats in the GCC.
- In the UAE, QSR is the leading food service channel, accounting for over 41% revenue share in 2022. The market is dominated by large business houses such as **Alshaya, Americana,** and **Azadea,** which operate multiple brand franchises. These three business houses combined hold approximately 10% of the food service market of the UAE.
 - Alshaya, a multinational retail franchise operator headquartered in Kuwait, operates Starbucks, The Cheesecake Factory and P.F. Chang's in the MENA region.
 - Americana, a food company headquartered in Sharjah, operates global brands such as KFC, Pizza Hut, Hardee's, Krispy Kreme, and TGI Fridays across the MENA region and Kazakhstan.
 - Azadea, a premier lifestyle retail company that owns and operates more than 40 leading international franchise concepts across the MEA region is the third-biggest player in the country and operates F&B brands like Paul (French chain of bakery-café restaurants) and Peal Juice bar.
- **Yum! Brands, CKE Restaurants, Doctor's Associates, Restaurant Brands International, McDonald's, Brinker International,** and **Golden Gate Capital** are some of the other popular operators in the QSR category.
- Key players in the Saudi Arabian food service market include **Albaik, Almarai, Nadek, Savola Group,** and **SADAFCO.**

06 Key brand tie-ups and initiatives



Switch Foods has partnered with several organisations, including **Al Safadi**, **Paul Café**, **The First Group**, **Emirates Airlines**, and **The Millennium Hotels & Resorts Group**, to develop and offer specialized plant-based menus.



Protein Alternatives (PALT) Initiative (Abu Dhabi) – An innovation ecosystem effort, co-organised by **ADNEC Group** and **ADIO**, aimed at building collaboration platforms around alternative proteins, research, investors, producers, and government agencies as part of Global Food Week 2025. This fosters partnerships between local actors and international tech innovators.



Planted, a European plant-based meat start-up, entered the UAE and broader Middle East foodservice market through distribution partnerships with select restaurant and hotel operators, expanding alternative protein availability across HORECA channels.

07 Key distributors, manufacturers, and retailers



Baqer Mohebi Enterprises (BME) handles both food and non-food consumer products, with an extensive distribution network serving supermarkets, hotels, and restaurants.



Al Saniya Foodstuff Trading offers a wide range of food products and has a strong presence in both retail and HORECA sectors.



Gulf International distributes top FMCG brands such as Betty Crocker, Mars Wrigley, and Douwe Egberts Coffee.



Lifco International distributes dry, chilled, and frozen food products, serving major hypermarkets, restaurants, and hotels across the region.



AJD Trading Company, a premium food distributor in the UAE, specialises in importing high-quality food products from international suppliers and distributing them at competitive prices.



Lootah Premium Foods, known for introducing new brands in the UAE and the GCC, supplies premium products to retail and HORECA channels.



Crescent General Trading LLC specialises in distributing brands like Bajaj, Weikfield, and Parle.



Al Maya Distribution distributes both food and non-food products to retail outlets, restaurants, and supermarkets across the country.

08 Regulatory overview

Legislative authority / Regulatory body

Ministry of Climate Change and Environment (MOCCAE), Ministry of Industries and Advanced Technologies (MOIAT), Ministry of Health (MOH), and Ministry of State for Food and Water Security.

Local municipalities within each emirate, such as the Abu Dhabi Agriculture and Food Safety Authority (ADAFSA) and The Food Control Department—Dubai Municipality, serve as administrators of the federal food regulations, ensuring that imported and locally produced products comply with national laws.

Food laws are established within the GCC Gulf Standardisation Organisation (GSO) and adopted by participating member countries. All GCC member states, including the UAE, have the authority to develop and institute national food legislation in addition to those formed within the GSO.

Food law

[UAE Federal Law No. 10 of 2015 on Food Safety](#) imposes standards and regulations for maintaining the safety and quality of food and ensuring the protection of public health and consumers.

The law states that no food may be imported into the country for the first time without the approval of the MOCCAE.

Labelling regulation

[The UAE.S GSO 9:2019 'Labeling of Prepackaged Food Stuff'](#) and its referenced GSO standards identify the food labelling requirements for the UAE.

[The UAE.S GSO 2233:2021 'Requirements of Nutritional Labeling'](#) requires mandatory disclosure of nutritional information.

[General Restriction and Requirements Relevant to Prepackaged Food Stuffs Labels](#)

Plant-based meat and dairy products

There are no specific standards for plant-based meat or dairy alternatives.

Fermentation-derived and cultivated meat

Cell-based food and novel fermentation-derived foods fall under UAE.S 5048/2021, 'General Requirements for Novel Foods,' which sets out general requirements for importing, manufacturing, or marketing novel foods.

Genetically Modified Organism (GMO) regulation

In the UAE, the import, export, and circulation of genetically modified organisms (GMOs) and their products are regulated by [Federal Law No. 9 of 2020](#), requiring permits from the Competent Authority and notification to the MOCCA.

Import-export portal or services (if any)

[ZADI Portal](#)

[ZAD Portal](#)

[Dubai Municipality Services - Food Safety Department](#)

Registration of product/business

UAE importers must apply for a label assessment on food items before entry into the country. This process can be completed through ZAD, the Dubai Municipality's Food Import and Re-export Service (FIRS), or ZADI portals.

In Dubai, importers must receive label approval for food consignments for local consumption and re-export.

Food items registered for the first time and intended for import into Dubai will undergo laboratory testing through Dubai Municipality. Testing is based on product safety risks and the frequency of importation. If an ingredient or additive is detected but not included on the label, the food item will be rejected.

Tariff benefits

Under the UAE-India Comprehensive Economic Partnership Agreement (CEPA), a concessional tariff of 0% is applicable on exports to the UAE from India. To benefit from this, the goods must meet the Rules of Origin, which typically require at least 50% Regional Value Content (RVC). These conditions must be proven by certificates or declarations from notified agencies.

While GCC and India have been in negotiations of an FTA for quite some time now, currently there is no concessional tariff applicable on the exports to GCC countries (except the UAE). The standard rate of tariff is 5%.

