



SELLING NEW ZEALAND RED MEAT IN THE UNITED ARAB EMIRATES

Understanding the landscape and consumers for New Zealand exporters.

EMEA MARKET RESEARCH, ERIN MADDREN | July 2025

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Introduction to this report

Background

The UAE has a strong demand for red meat. Domestic production is limited due to the harsh climate and lack of agricultural land, so the country relies heavily on imports despite government efforts to improve food security.

New Zealand red meat exporters have promising opportunities in the UAE, particularly following the Comprehensive Economic Partnership Agreement (CEPA). This agreement removes tariffs on beef and lamb, improving access for New Zealand's halal-certified, high-quality red meat, which is well-suited to the UAE market.

Purpose

The aim of this market research report is to provide a comprehensive overview of the red meat market in the UAE, focusing on macro trends, market size, consumer insights, and routes to market.

The report aims to give New Zealand red meat exporters insight on the opportunities available to them in the UAE, which will allow them to enter and grow in the market using evidence-based decision making and optimised market strategies.

Methodology

This report was generated using desktop research, with NZTE subscriptions and publicly available information and a primary consumer survey. Key sources of data are listed below:

- Euromonitor International
- ITC Trade Map
- NZTE Survey via Toluna (June 2025), n=364 (see [page 16](#) for details)

Limitations

Some of the information provided in this report was sourced from secondary data sources. Due to the nature of secondary data, all values and figures should be treated as indicative, rather than absolute. The latest information available at the time of research was used, however present values may differ.

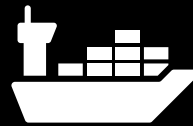
This report also uses primary data collected through a consumer survey. While surveys offer valuable insights into consumer attitudes and preferences, they are subject to certain limitations. This includes that it is a sample of the population and biases.

Key takeaways



UAE's beef & lamb market is small but fast-growing

Though smaller than major global markets, the UAE's beef and lamb segments are expanding more rapidly, placing them alongside countries like New Zealand in scale but ahead in growth, highlighting strong potential for premium red meat offerings.



UAE's red meat imports are rising, but New Zealand plays a minor role

The UAE's red meat imports have grown significantly over the past decade. Despite this growth, New Zealand remains a minor supplier, contributing just 1% of sheep/lamb and 3% of bovine meat imports, highlighting a clear opportunity to expand its presence in a fast-growing, premium-oriented market.



Beef is an everyday staple, lamb is eaten more on special occasions

Consumer habits show that beef is more commonly eaten at home. Lamb, on the other hand, sees relatively higher consumption during celebrations and holidays, reinforcing its role as a festive and culturally significant meat in the UAE.



Consumers show strong awareness and preference for premium cuts

Consumption patterns reveal that UAE consumers are highly engaged with red meat, favouring a wide range of cuts, many of which are premium. Very few respondents express indifference for cuts, underscoring a market that values quality and variety in both beef and lamb.



Country of origin is a top priority for UAE red meat consumers

While product quality leads as the most important purchasing factor, country of origin ranks second, even over price. This underscores the critical role of provenance in building consumer trust and highlights a strategic opportunity for exporters like New Zealand to elevate their visibility and credibility in the UAE market.



New Zealand is recognised for quality, but trails key competitors

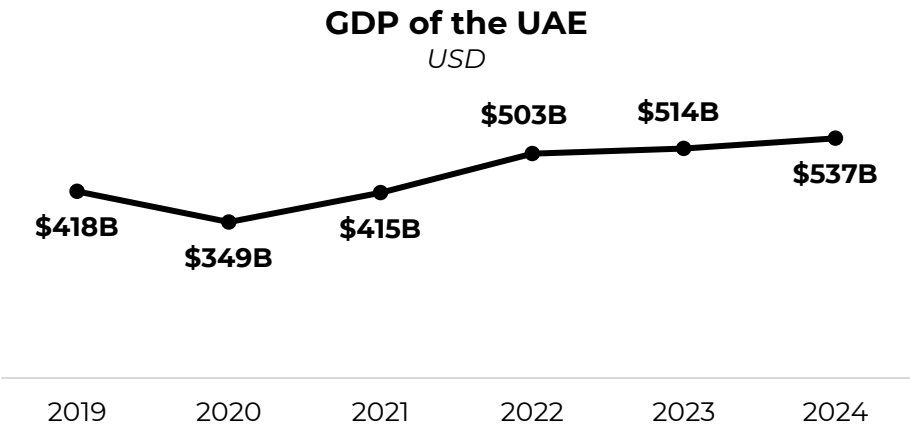
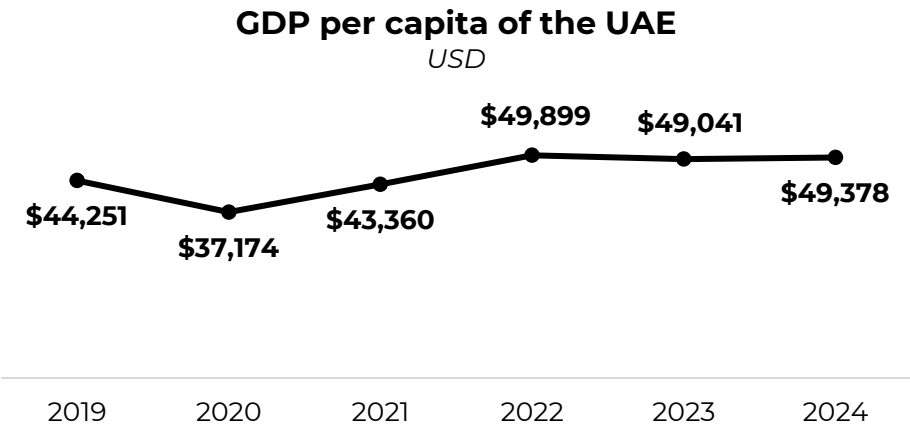
Unprompted associations reinforce New Zealand red meat's premium image, with consumers linking it to quality, grass-fed production, great taste, and sustainability. Yet New Zealand still trails Australia, the UAE, and Pakistan in perceived quality. To grow, New Zealand must communicate clearly and focus on differentiation.



SECTION 1

THE UAE IN CONTEXT

The UAE boasts the third-largest economy in the Middle East and ranks among the region's wealthiest nations per capita.



**Estimated population
in 2024:**



Political system:

The UAE is a constitutional federation of seven emirates.

Language:

- Official: *Arabic*
- Official languages of the courts: *Arabic, English, French, Hindi, Russian.*
- Road/traffic signs: *Arabic and English.*
- Business: *English.*

Religion:

Islam is the official religion of the UAE. Other religions are practiced with the policy of tolerance and co-existence, and religious inclusion.

The recently concluded free trade agreement is expected to further enhance trade opportunities for New Zealand exporters in the UAE.

Bilateral trade between New Zealand and the UAE 2024



New Zealand's total exports to the UAE:

\$670 million USD

Top products:

- Dairy
- Industrial products
- Horticulture
- Red meat



New Zealand's total imports from the UAE:

\$99.5 million USD

Top products:

- Plastics
- Carpets
- Glass
- Jewellery

New Zealand and the UAE concluded negotiations on a free trade agreement known as a **Comprehensive Economic Partnership Agreement (CEPA)** in September 2024, which will give New Zealand exporters preferential access to this market and offer significant growth opportunities. Read more [here](#).

It is important to understand cultural nuances in the UAE in order to successfully do business there.

Important cultural nuances in the UAE



Relationship-centric

Personal connections are paramount. Invest time in building trust through face-to-face meetings and social interactions.



Longer timelines

Business decisions can take time. Be prepared for multiple meetings and a longer sales cycle.



Respect Islamic customs

Be mindful of prayer times, Ramadan, and dress codes.



Less direct communication

Understand indirect communication and the importance of building rapport.



Gift giving is appreciated

A thoughtful gesture can strengthen relationships but be aware of corporate policies.



Women in business

The UAE is much more liberal than other countries in the region. Women hold significant roles in both public and private sectors.



Dress-code

Adhere to modest dress codes, especially in conservative settings.

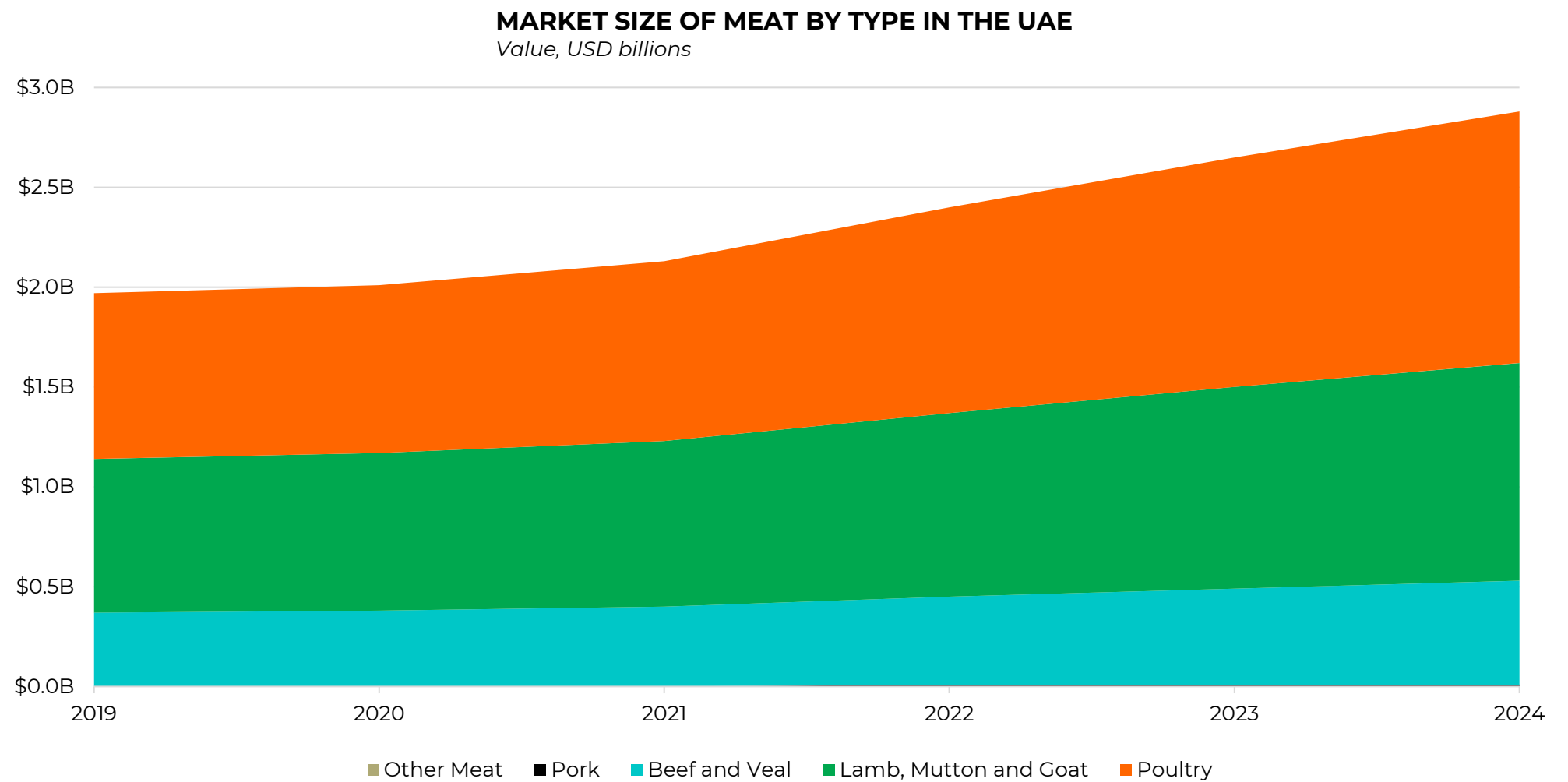
Read more on our [UAE Market Guide](#) on MyNZTE.



SECTION 2

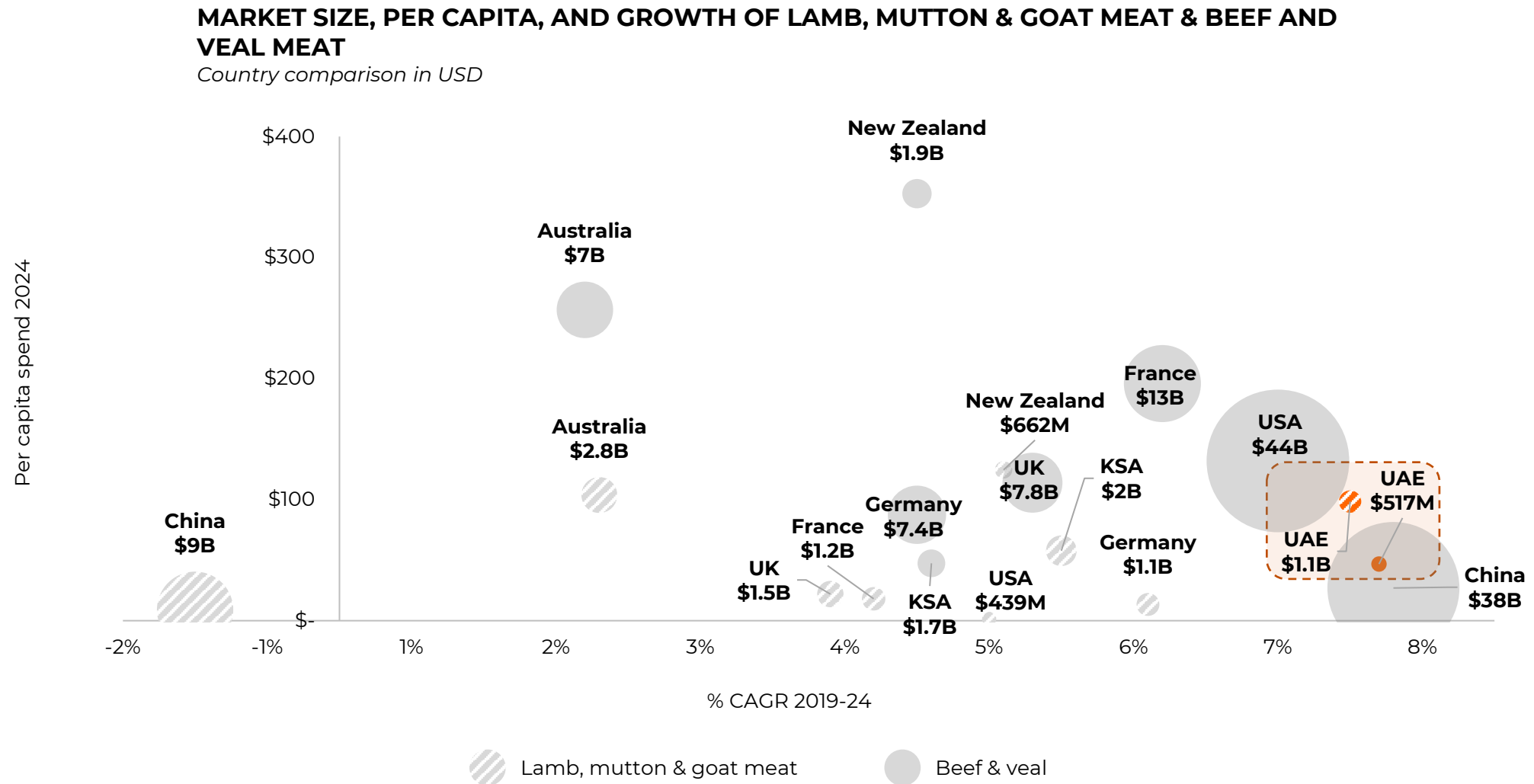
SIZE OF THE MARKET

Poultry is the largest meat category in the UAE in value terms, followed by sheep and goat meat.



Source: Euromonitor International, 2024.

While the UAE’s red meat categories are smaller than major global economies, the size is similar to countries like the UK and New Zealand and is growing faster.

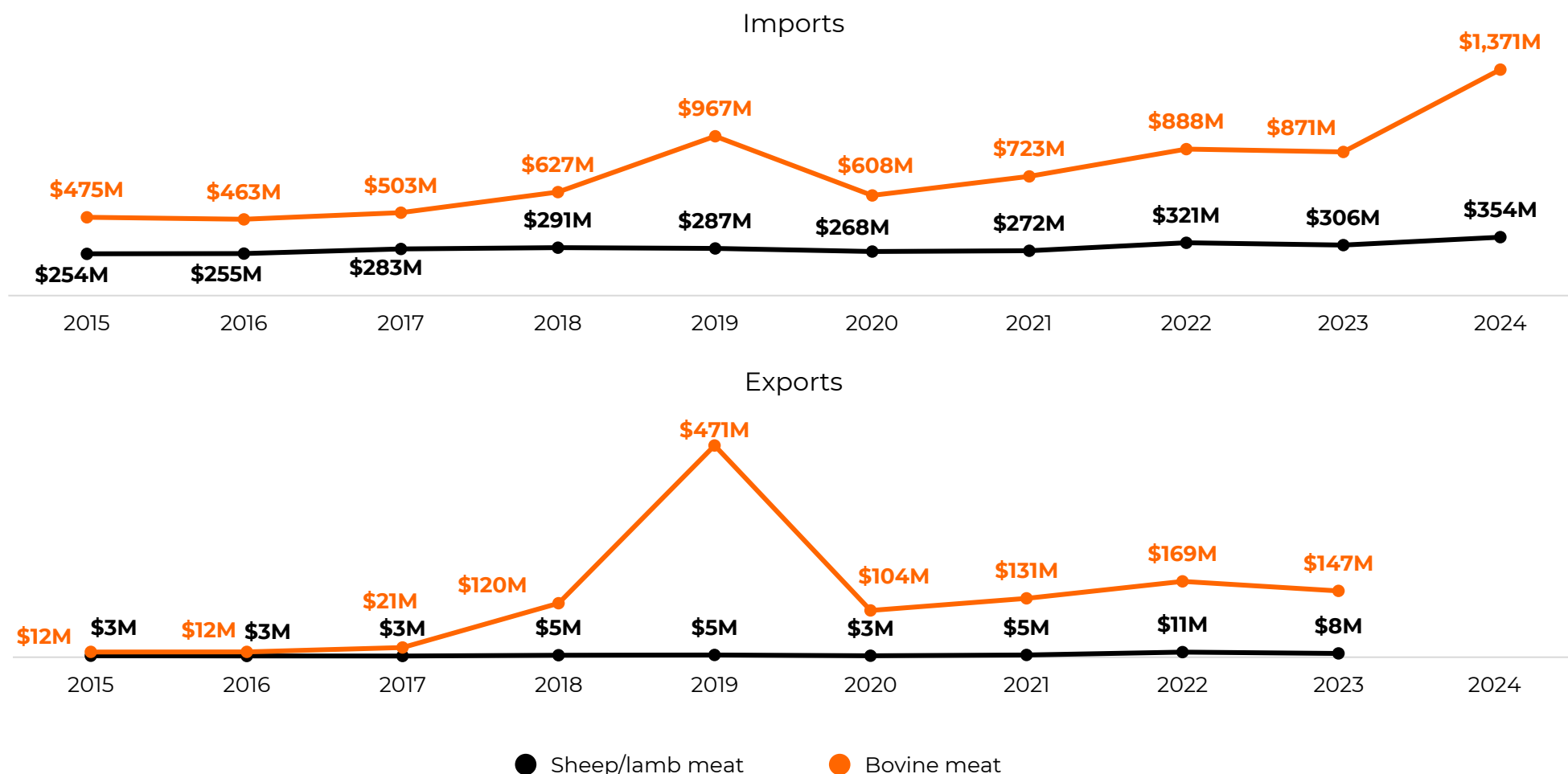


Source: Euromonitor International, 2024.

The UAE's red meat imports have grown steadily over the past decade, with bovine meat imports more than doubling and sheep/lamb imports reaching \$354 million in 2024.

UAE'S IMPORTS AND EXPORTS OF SHEEP/LAMB & BOVINE MEAT

Value, USD millions



The UAE mostly imports fresh/chilled lamb and sheep meat, while frozen products make up the larger share of its bovine meat imports.

The UAE market shows a strong preference for fresh/chilled sheep/lamb meat, which accounts for 78% of total imports in that category.

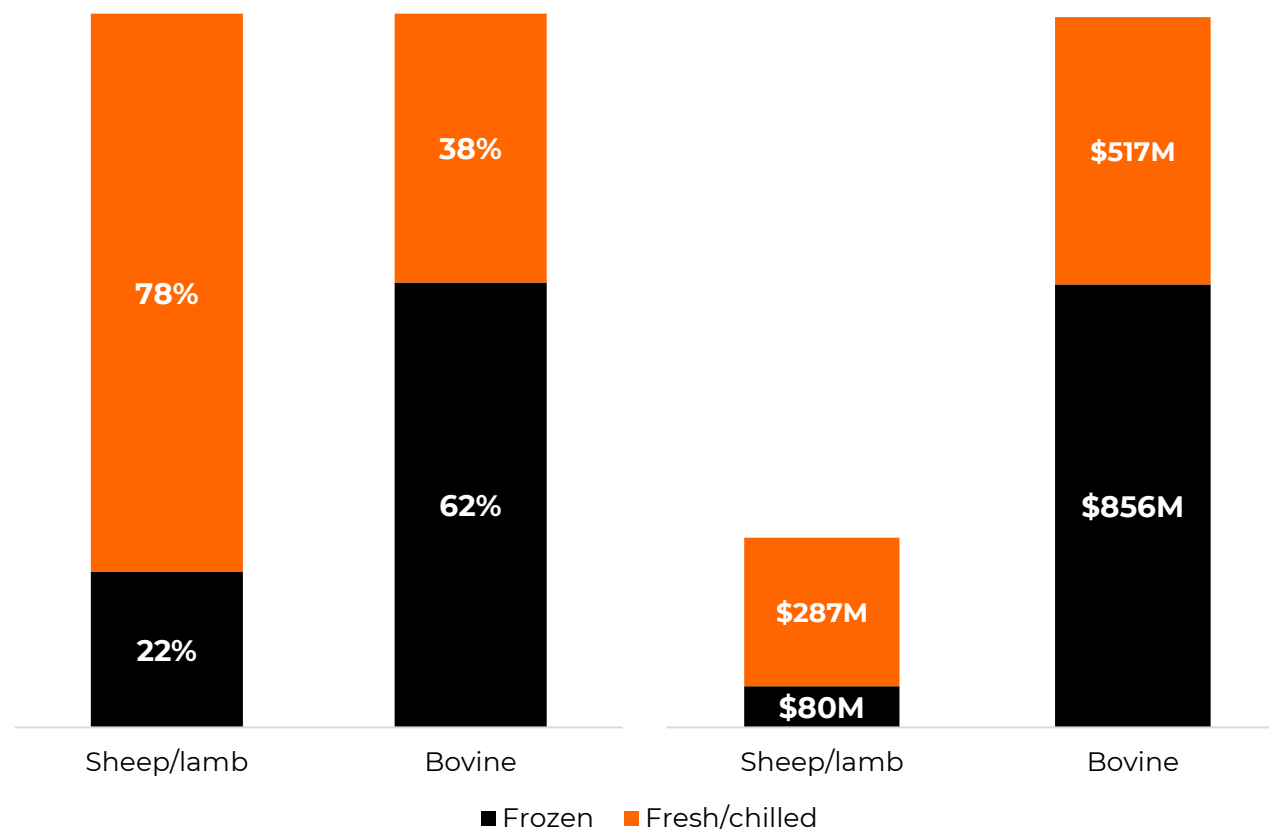
In contrast, bovine meat imports are dominated by frozen products (62%).

For New Zealand red meat exporters, this presents a strategic opportunity to prioritise fresh/chilled sheep/lamb exports to meet UAE consumer demand.

At the same time, maintaining a balanced supply of both frozen and fresh/chilled bovine meat will be essential to cater to the broader market.

UAE'S IMPORTS OF SHEEP/LAMB & BOVINE MEAT FROZEN VS FRESH

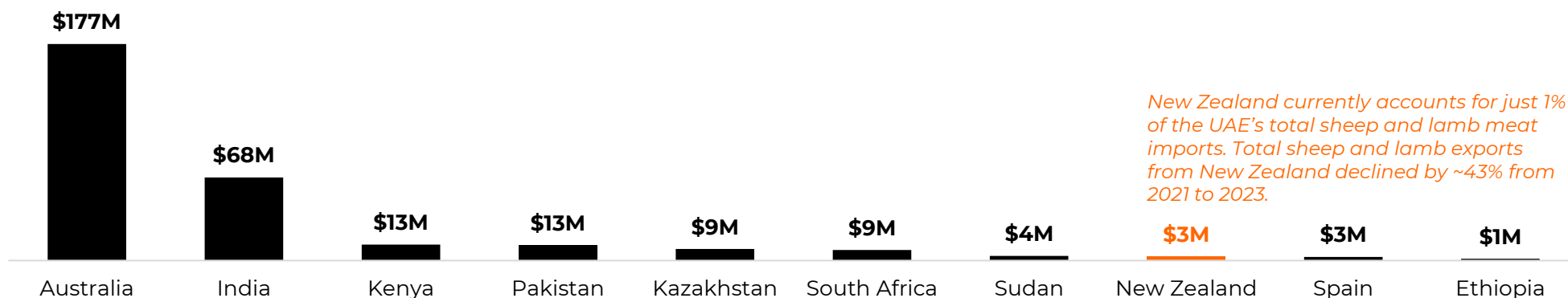
Value, USD millions



New Zealand plays a relatively minor role in the UAE's red meat imports, contributing just 1% of sheep/lamb and 3% of bovine meat, highlighting a potential growth opportunities.

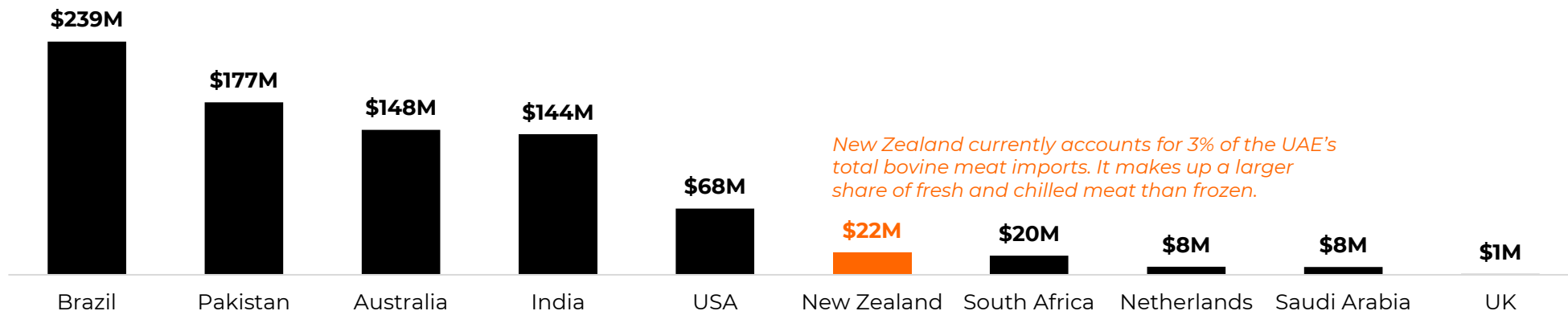
UAE'S IMPORTS OF SHEEP AND LAMB BY COUNTRY (TOP 10)

Value, USD millions



UAE'S IMPORTS OF BOVINE MEAT BY COUNTRY (TOP 10)

Value, USD millions





SECTION 2

CONSUMER SURVEY INSIGHTS



The following section contains insights from a primary consumer survey conducted by NZTE EMEA.

- The survey was conducted with a sample size of 364 consumers in the UAE who had eaten beef and lamb with the past 6 months.
- All respondents were 18 years old and over.
- The fieldwork was carried out in June 2025.
- The survey was carried out in English and Arabic and translated using the DeepL translation tool and in-market fluent speakers.
- The survey was built and carried out using the Toluna Start platform.



The majority of consumers report eating red meat on a weekly basis, indicating a strong preference for regular consumption.

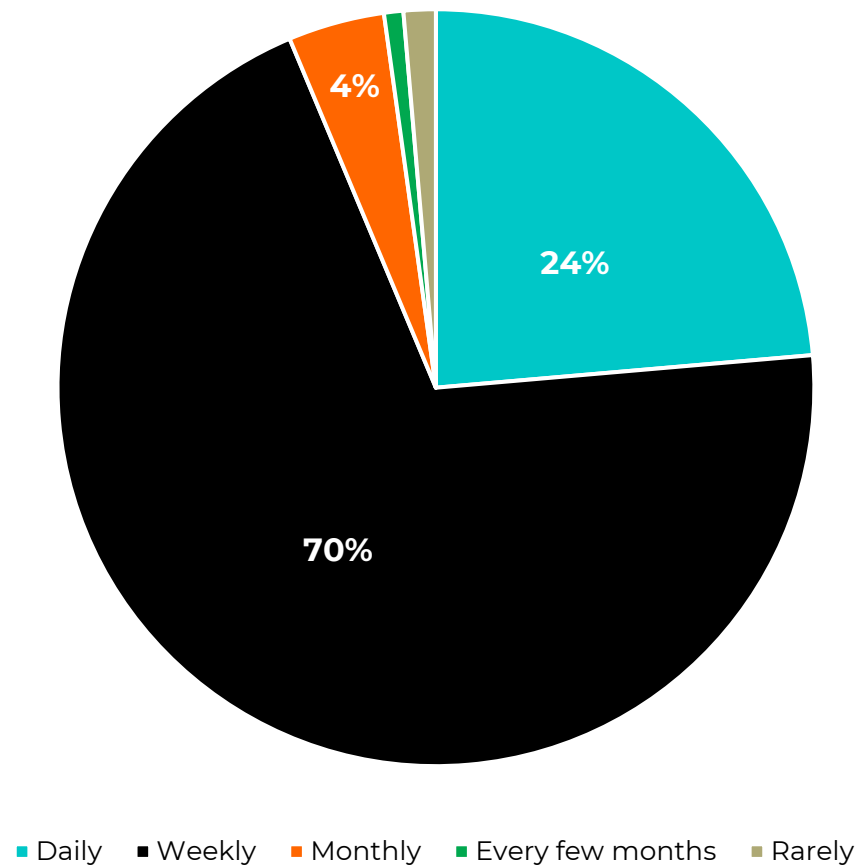
Red meat is a regular part of consumers' diets, with a strong preference for weekly consumption.

While only a small percentage eat red meat daily, the majority of consumers, of those who have eaten lamb and beef in the past six months, report eating it on a weekly basis.

This indicates a consistent demand and suggests opportunities for targeted marketing around habitual consumption patterns.

RED MEAT CONSUMPTION FREQUENCY

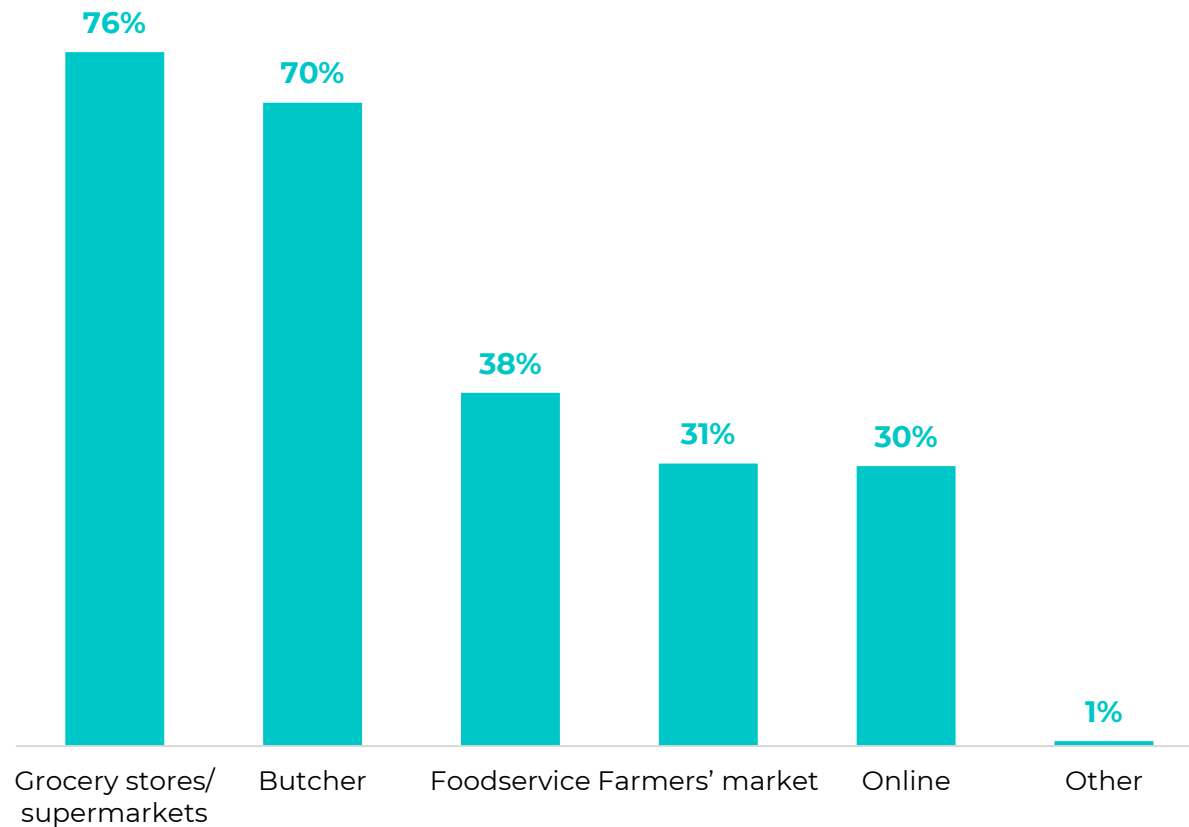
'On average, how often do you eat red meat?' (single pick, n=364)



While grocery stores and butchers dominate, nearly a third of consumers also shop via farmers' markets and online, signalling opportunities in both traditional and emerging retail channels.

RED MEAT PURCHASING CHANNELS

'When you buy red meat, where do you usually purchase it from?'
(multi-pick, n=364)

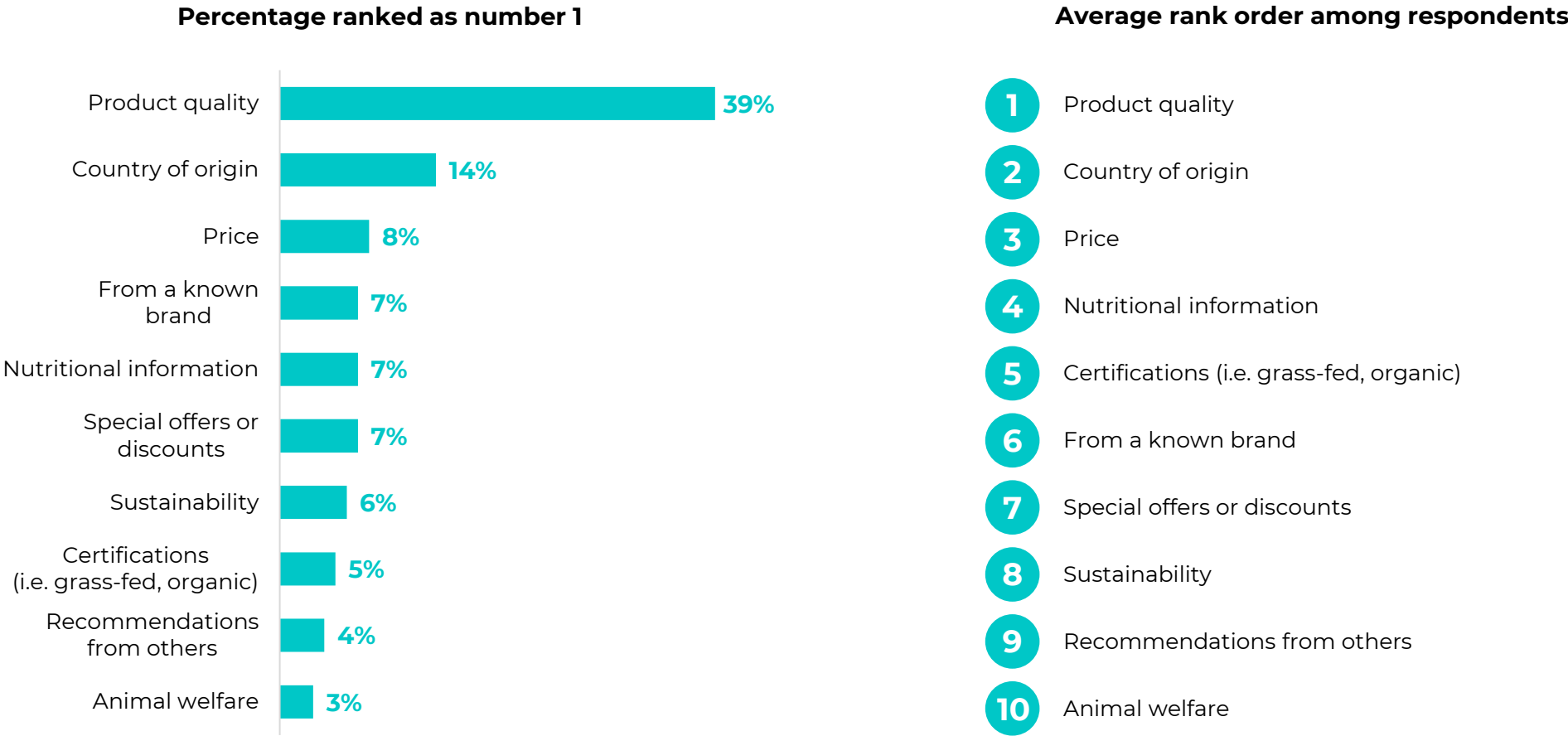


Grocery stores and supermarkets are the most common sources for red meat purchases, followed closely by butchers – highlighting the importance of convenience and trust in quality. However, nearly a third of consumers also buy from farmers' markets and online platforms, indicating a growing interest in specialty and digital channels. This diversification presents opportunities for brands to expand their reach across both traditional and emerging retail environments.

Product quality is the top priority for consumers when purchasing red meat, followed by country of origin and price, highlighting a strong focus on trust and value.

PURCHASING PRIORITIES FOR RED MEAT

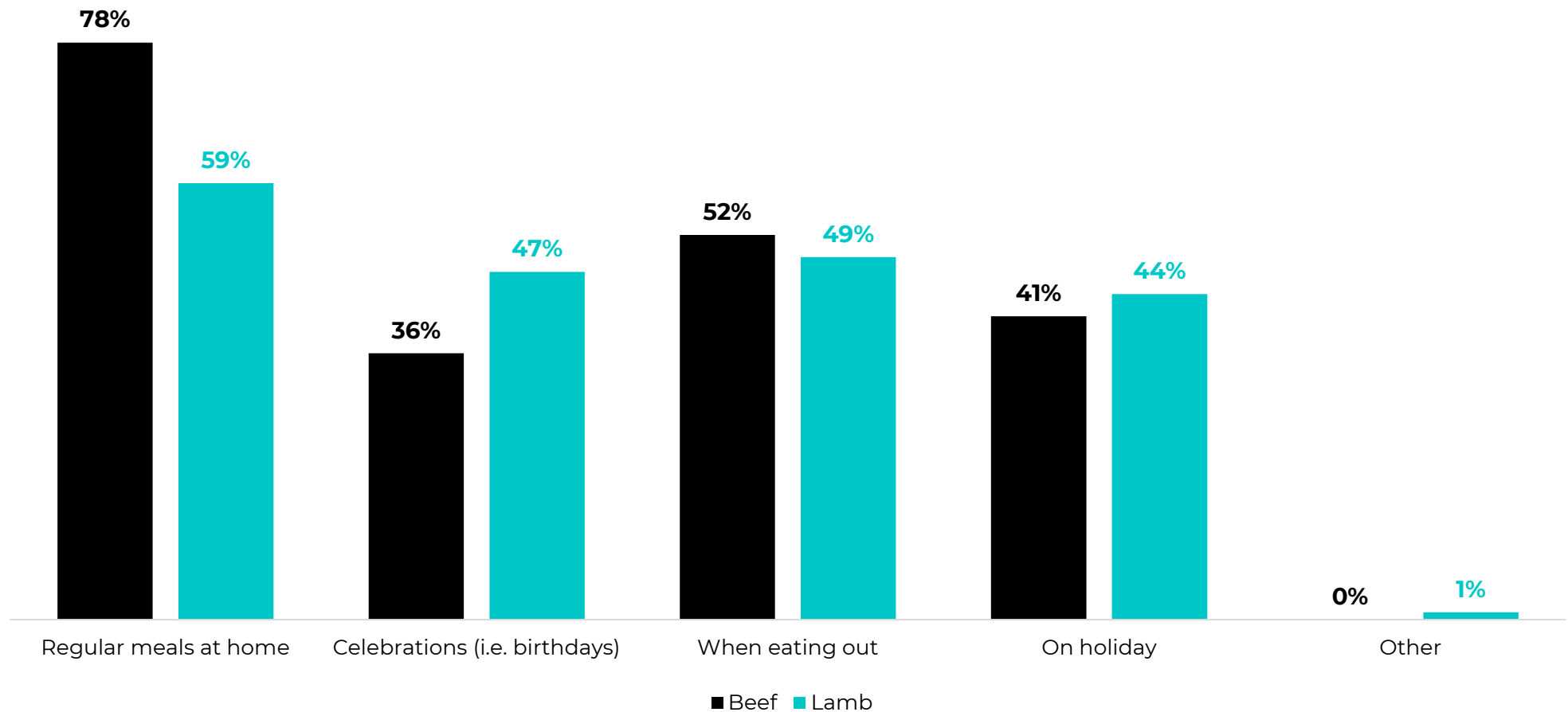
‘Which factors are most important to you when you are buying red meat?’ (rank all, n=364)



Beef is more commonly consumed at home, while lamb sees relatively higher consumption during celebrations and holidays, reflecting distinct roles in everyday and special occasion meals.

CONSUMPTION OCCASIONS FOR BEEF AND LAMB

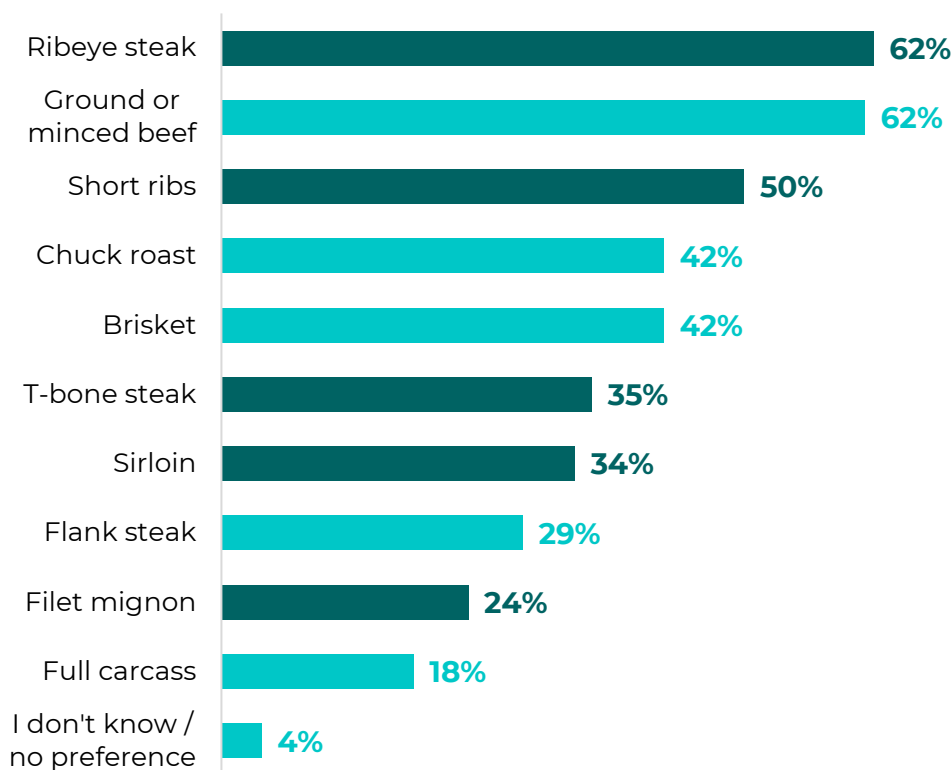
'On what occasions do you typically eat beef and lamb?' (multi-pick, n=364)



Consumers in the UAE eat a variety of beef and lamb cuts, with many popular cuts being premium. The low indifference shows high consumer awareness and engagement with red meat cuts.

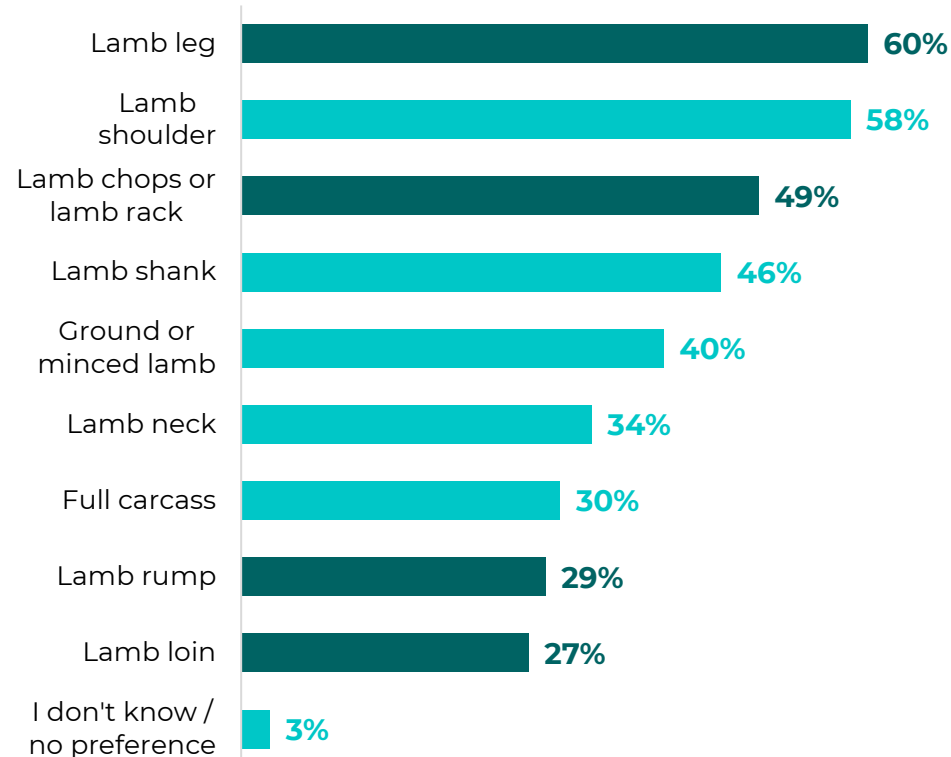
BEEF CUT PREFERENCES

'Which cuts of beef do you usually eat?' (multi-pick, n=364)



LAMB CUT PREFERENCES

'Which cuts of beef do you usually eat?' (multi-pick, n=364)



Cuts that tend to be more premium
Cuts that tend to be more economy

A strong preference for chilled red meat among UAE consumers, highlights the importance of freshness and suggests exporters should prioritize chilled formats, especially for premium cuts.

Storage preferences among UAE consumers reveal a nuanced market landscape that balances freshness with practicality.

87% of red meat consumers in the UAE purchase chilled red meat, either exclusively (44%) or in combination with frozen (43%).

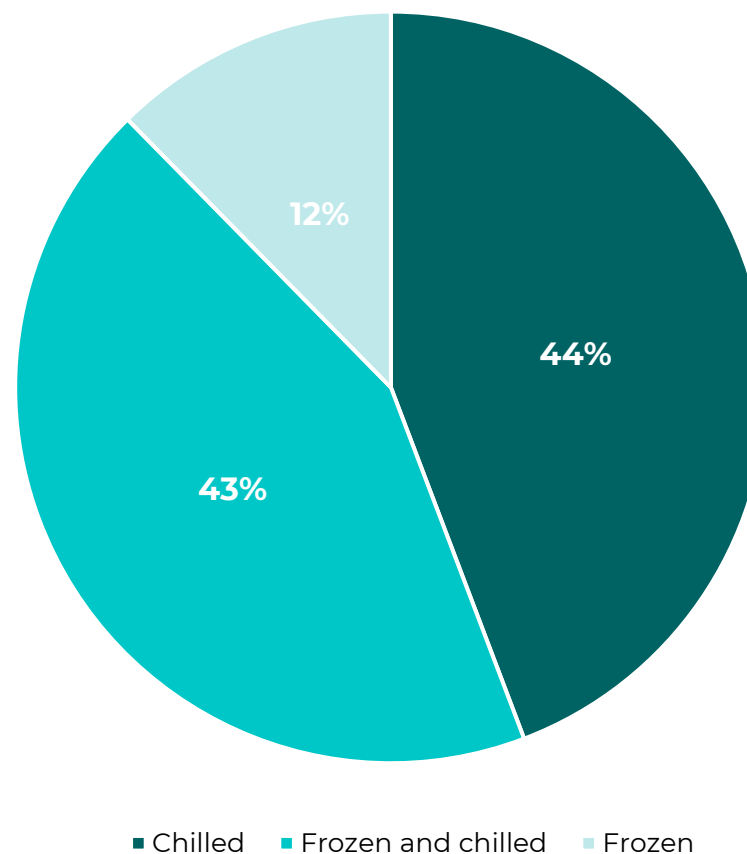
This overwhelming preference demonstrates a strong consumer inclination toward freshness, quality, and immediate use.

Only 12% of consumers only purchase frozen meat, indicating that exporters should be cautious about relying solely on this format.

Exporters offering premium cuts should consider primarily chilled formats. Those offering more economy cuts should consider both premium and economy cuts.

RED MEAT STORAGE PREFERENCE

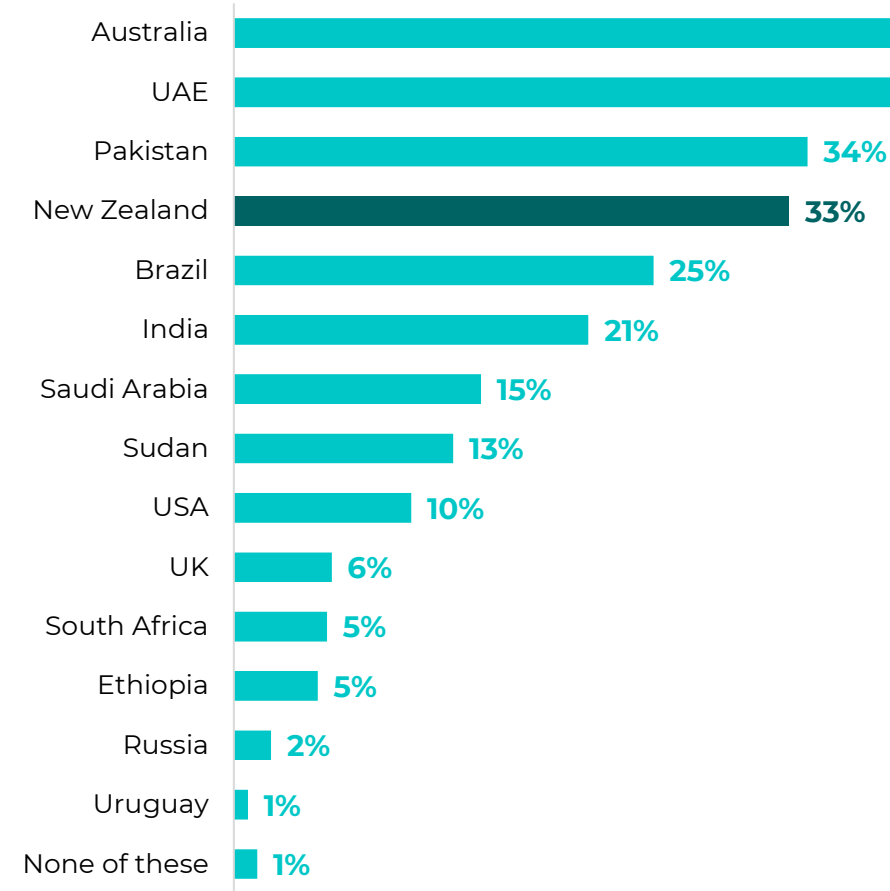
'How do you usually purchase red meat cuts?' (single-pick, n=364)



New Zealand ranks behind Australia, UAE, and Pakistan in perceived red meat quality. Australia is the key competitor to differentiate from.

PROMPTED AWARENESS: HIGH QUALITY RED MEAT COUNTRIES OF ORIGIN

‘Which of these countries do you think produce the best quality red meat?’ (multi-pick, n=364)



Awareness of New Zealand as a high-quality red meat producer is relatively strong among UAE consumers, with 33% identifying it as one of the best sources. However, it ranks behind Australia, UAE, and Pakistan, indicating that there is room to grow its brand presence.

The UAE’s high ranking reflects a strong local preference, which is further supported by separate data showing that **46% of consumers prefer local meat, compared to 26% who prefer imported and 27% who have no preference.**

This preference for local meat suggests that freshness, familiarity, and national pride play a significant role in purchasing decisions. It also implies that imported meat, while recognised for quality, must work harder to build trust and relevance.

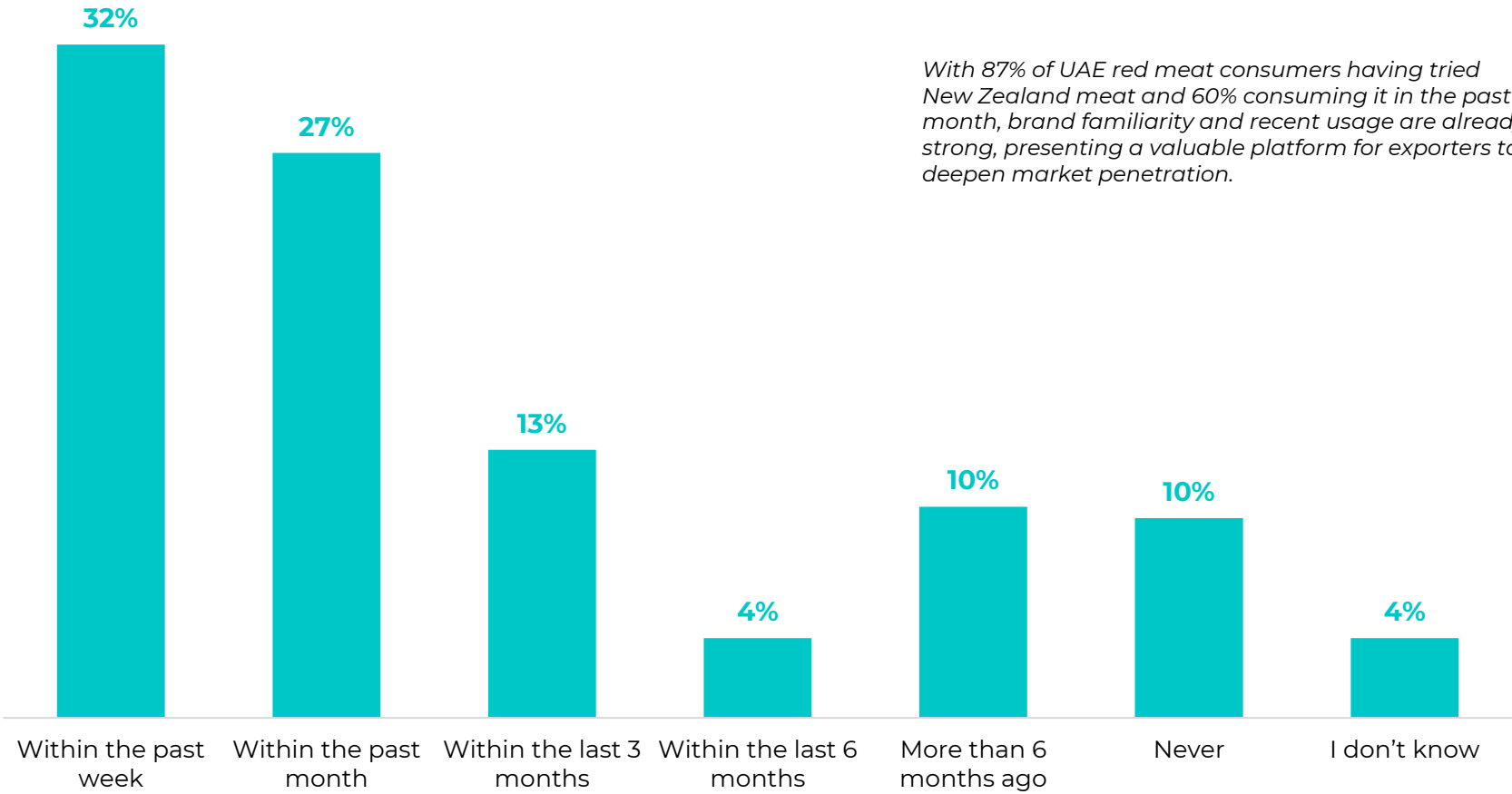
Action points for New Zealand exporters:

- Focus on key consumer priorities for red meat to bridge the local-imported gap
- Targeted marketing campaigns to elevate NZ’s profile and differentiate from the likes of Australia
- Target the segment who don’t have a particular preference for local vs. imported meat

New Zealand red meat has a strong presence amongst regular beef and lamb consumers in the UAE.

NEW ZEALAND RED MEAT CONSUMPTION

'When was the last time you ate red meat from New Zealand?' (single pick, n=364)



Source: NZTE Consumer Survey via Toluna Start, *Exploring red meat consumption in the UAE*, June 2025.

While quality is the dominant association with New Zealand red meat, other perceptions include its grass-fed production, great taste, and sustainability. However, there is uncertainty around whether it is halal.

UNPROMPTED PERCEPTIONS OF NEW ZEALAND RED MEAT

'Thinking about when you are buying or ordering red meat, i.e. beef or lamb, if you saw that it was from New Zealand, what comes to mind?' (open-end, n=364)

High quality

203 mentions

By far the highest unprompted association with New Zealand red meat is that it is high quality. 56% of respondents had some mention of this.

"If you see that red meat (beef or lamb) is from New Zealand, it often brings to mind perceptions of high quality..."

Grass fed, no hormones, no antibiotics etc.

44 mentions

The second highest unprompted association was regarding certifications or claims, mostly commonly grass-fed, as well as no hormones or antibiotics, and organic.

"New Zealand is known for its clean environment, grass-fed livestock, and strict food safety standards."

Good taste

40 mentions

Another common association is that New Zealand red meat has great taste; 11% of respondents noted this. Additionally, there were 15 mentions of the meat being tender or juicy.

"I would expect the meat to be tender, flavorful, and of good eating quality."

New Zealand environment & sustainability

38 mentions

Another noteworthy 10% of respondents made comments about imagery and visuals of the 'clean, green' and sustainable natural environment in New Zealand.

"I would think of animals raised on open pastures."

"...grass-fed meat raised in natural, sustainable conditions."

Freshness

23 mentions

Another theme that was evident in the responses was the association with New Zealand red meat being fresh. This is interesting, noting the distance product must travel to the UAE.

"New Zealand is a renowned country that produce fresh and good quality lamb meat."

Uncertainty about New Zealand meat being halal

13 mentions

A more niche, but important pattern emerged amongst 4% of respondents was the belief that NZ meat is not halal or uncertainty around it. This points to a clear action point around emphasising halal certifications.

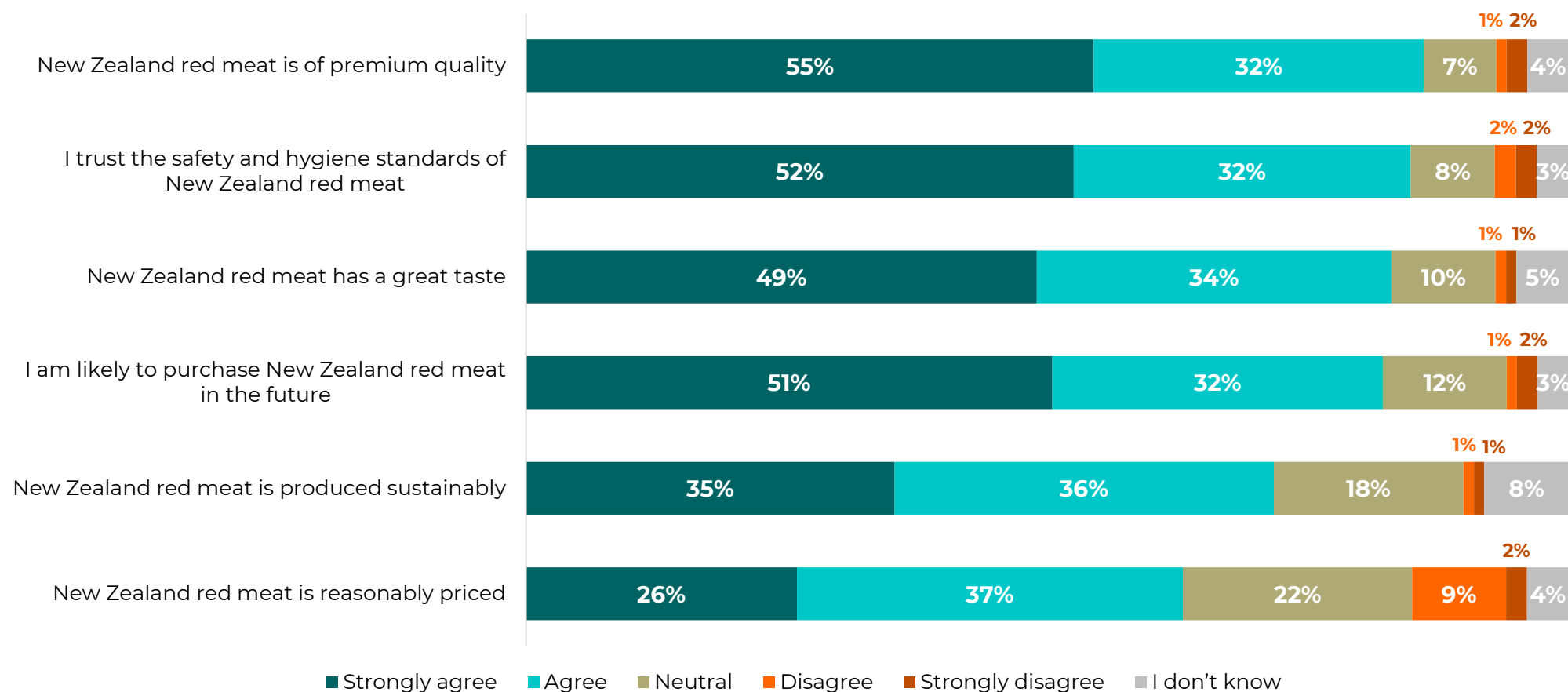
"Don't think gonna buy as not sure if halal or not."

"It would probably not be halal as it isn't a Muslim country."

New Zealand red meat benefits from positive associations. Over 85% of surveyed consumers strongly agree or agree that New Zealand red meat is premium quality, safe, hygienic, and has great taste.

PROMPTED PERCEPTIONS OF NEW ZEALAND RED MEAT

'Please indicate your level of agreement with the following statements about New Zealand red meat.'
(single pick per row, n=364)





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