

Market Insights

Lamb Market Outlook

Q1 2026

International Halal Lamb Supply Outlook



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Executive Summary

The international halal lamb market enters 2026 amid a period of structural change.

Across key sourcing regions, buyers are facing the combined effects of rising livestock costs, freight market shifts, changing consumer demand, currency fluctuations and increasing scrutiny of supply-chain compliance.

For many importers, the challenge is no longer simply sourcing product. It is securing reliable supply while maintaining quality, pricing discipline and operational consistency.

Three themes are expected to define procurement activity throughout the first quarter of 2026:

1 Supply Security Will Matter More Than Spot Pricing

The lowest-cost supplier is not always the lowest-cost source once freight, documentation, transit times and operational risk are considered.

Buyers increasingly require suppliers capable of providing continuity rather than simply occasional price advantages.

2 Multi-Origin Procurement Will Continue To Expand

Reliance on a single supplying country creates unnecessary exposure.

Political developments, weather events, logistics constraints and livestock shortages can rapidly alter supply conditions.

The strongest procurement programmes increasingly utilise approved suppliers across multiple origin markets.

3 Market Intelligence Has Become A Competitive Advantage

Successful buyers are becoming more proactive.

Understanding pricing trends, freight markets, livestock dynamics and seasonal consumption patterns provides greater procurement flexibility and improved commercial outcomes.

At Vanta Food Group, we believe the next generation of successful supply programmes will be built around:

- Supply continuity
- Origin diversification
- Supplier oversight
- Market awareness
- Disciplined execution

The objective is not merely to secure product.

The objective is to build dependable supply relationships capable of performing consistently under changing market conditions.

Sources & Methodology

About This Report

This report has been prepared by Vanta Food Group as a commercial market briefing for importers, distributors, wholesalers, retailers and food service operators involved in halal meat procurement.

The report combines:

- International trade observations
- Supply-chain assessments
- Public market information
- Livestock market analysis
- Freight and logistics considerations
- Vanta Food Group commercial analysis

The report should be viewed as an informational market publication and not a quotation or purchasing recommendation.

How To Read This Report

Throughout this publication, information appears under two classifications.

Observed Market Data

Observed Market Data refers to publicly available information, historical trade activity and reported market developments.

Vanta Market View

Vanta Market View represents the commercial opinion of Vanta Food Group based on available information and market observations.

These views are analytical opinions and should not be interpreted as guarantees of future market outcomes.

Global Market Overview

Current Market Conditions

The halal meat sector continues to benefit from growing consumer demand across Gulf markets.

At the same time, producers and exporters face ongoing cost pressures arising from livestock prices, feed costs, labour expenses and logistics expenditure.

While freight markets have generally stabilised compared with recent years, transportation remains a significant component of delivered product cost.

For international buyers, landed cost management remains a more meaningful metric than origin pricing alone.

Key Procurement Drivers For Q1 2026

Livestock Pricing

Livestock costs remain the single most influential factor affecting lamb pricing across origin markets.

Logistics Performance

Availability of refrigerated transport continues to influence competitiveness and delivered cost.

Currency Movements

Exchange-rate volatility can materially influence procurement economics.

Seasonal Consumption

Demand spikes associated with Ramadan and Eid al-Adha continue to influence inventory planning and procurement activity.

Major Supply Drivers

Vanta Market View: indicative weighting



Product Morphology & Specification Analysis

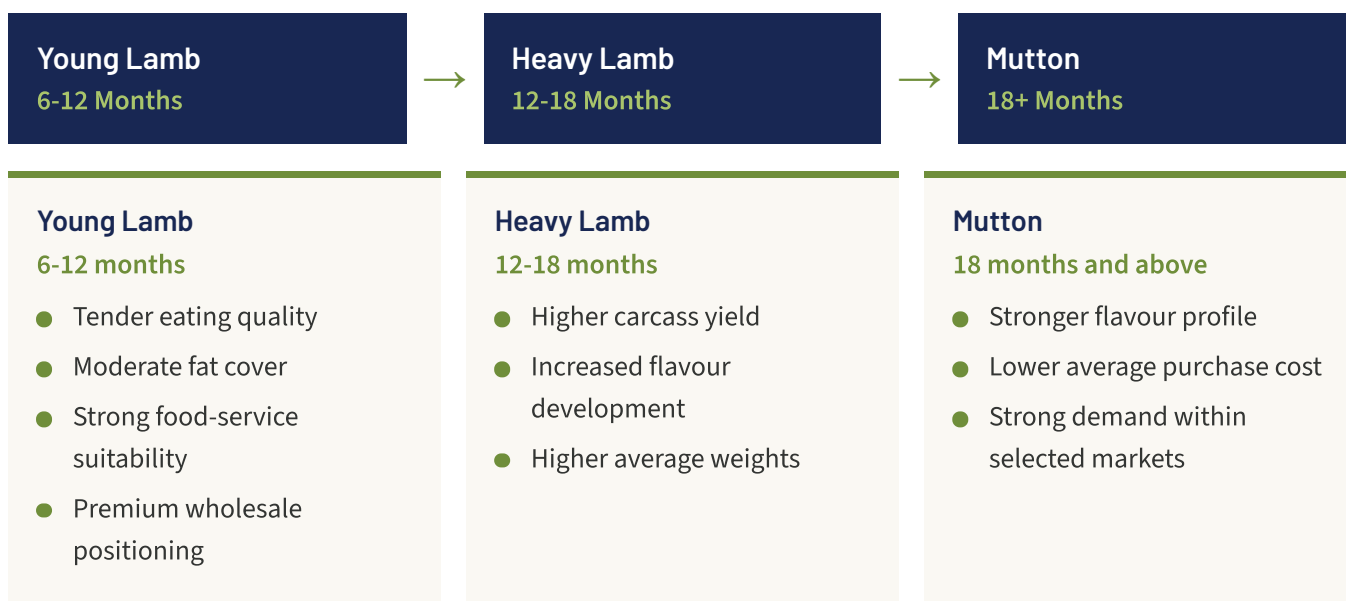
Understanding Morphology

Not all lamb products deliver the same commercial value.

Age, carcass weight, fat cover, breed characteristics and production systems all influence buyer outcomes.

Understanding product morphology helps align procurement decisions with destination market requirements.

Age Categories



Carcass Weight Categories



Vanta Market View

For GCC distribution markets, the most commercially flexible specification generally remains:

Product

Frozen Halal Lamb

Carcass Weight

18-24kg

Sex

Mixed Male & Female

Age

Under 12 Months

This specification generally balances:

- Availability
- Pricing
- Yield
- Processing flexibility

Origin Review

Kazakhstan

Observed Market Data

Market Position

Kazakhstan continues to emerge as an increasingly important source of halal lamb for regional and Gulf buyers.

The country has supplied lamb into markets including Kuwait and the UAE while building international export capability. Export demand from Gulf buyers has contributed to increased focus on the sector.

Strengths

- Extensive grazing systems
- Established halal production
- Growing export experience
- Geographic relevance to regional markets

Challenges

Kazakhstan has experienced significant livestock price inflation.

Industry reporting indicates lamb prices rose substantially during 2025-2026 due to stronger export demand along with higher feed, fuel and logistics costs.

Vanta Market View

Kazakhstan remains commercially viable.

However, success increasingly depends upon:

- Securing approved suppliers
- Long-term agreements
- Multi-origin procurement
- Early seasonal planning

The era of easy spot purchasing appears to be narrowing.

Romania

Observed Market Data

Market Position

Romania remains one of Europe's most significant sheep-producing countries and continues to maintain strong export links into Middle Eastern markets through established halal supply chains. Export-focused firms operating in Romania report extensive relationships with GCC buyers and substantial livestock-processing capabilities.

Strengths

- Large sheep population
- Established export infrastructure
- Strong logistics connectivity
- Mature processing capability
- Proven GCC market access

Challenges

- Existing competition from Gulf buyers
- Seasonal pricing fluctuations
- Regulatory administration requirements

Vanta Market View

Romania remains one of the most attractive regions for buyers seeking:

- Scale
- Consistency
- Export maturity
- Established halal channels

Romania currently offers one of the strongest combinations of export capability and operational reliability available to international buyers.

Origin Comparison Matrix

Vanta Market View: scores out of 10

■ Kazakhstan ■ Romania



Kenya Feasibility Assessment

Emerging Origin Review

Kenya is increasingly attracting industry attention as an emerging halal sourcing origin.

Although not yet viewed internationally alongside Romania or Kazakhstan, the country possesses meaningful livestock resources and favourable geographic positioning relative to Gulf markets.

Kenya Feasibility Scorecard

Vanta Market View: scores out of 10

Livestock Availability		8/10
Halal Compatibility		9/10
Labour Competitiveness		8/10
Processing Infrastructure		6/10
Export Capacity		5/10
Cold Chain Capability		6/10
Freight Connectivity		7/10
Documentation Maturity		6/10
Long-Term Potential		8/10

Overall Assessment

7.0/10

Vanta Market View

Kenya should be considered an emerging opportunity.

Partnerships should begin through:

- Facility inspections
- Trial shipments
- Cold-chain assessment
- Documentation verification
- Supply-chain testing

If infrastructure continues to develop, Kenya could become a strategically important sourcing region over the next decade.

Supply Chain Economics

Landed Cost Versus Farm-Gate Cost

The cheapest product at origin is not always the cheapest delivered product.

Successful buyers focus on:

- Product cost
- Processing cost
- Refrigeration
- Freight
- Documentation
- Import handling

The combined value of these components determines actual procurement competitiveness.

Illustrative Landed Cost Build-Up

Illustrative example, USD per kg. Not a quotation.

Farm-Gate Cost		\$5.80
Processing		\$0.80
Cold Storage		\$0.20
Freight		\$1.10
Documentation		\$0.15
Import Handling		\$0.25
Total Landed Cost		\$8.30

Seasonal Demand Outlook

Ramadan

Demand typically builds several weeks before Ramadan as importers and distributors increase inventory positions.

This often impacts:

- Cold storage utilisation
- Inventory planning
- Freight availability
- Procurement activity

Eid al-Adha

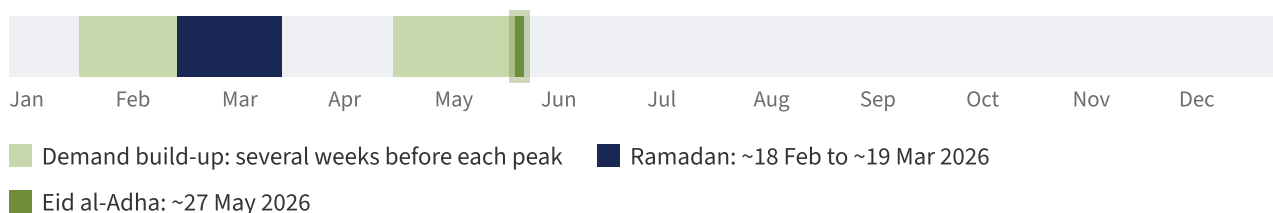
Eid al-Adha remains one of the most important demand drivers within halal meat markets.

It frequently influences:

- Livestock pricing
- Procurement schedules
- Supply availability
- Freight conditions

2026 Seasonal Demand Calendar

Dates are approximate; both are set by moon sighting and can differ by a day between countries.



Strategic Procurement Considerations

Why Origin Diversification Matters

Historically, procurement teams sought one preferred supplier.

Modern supply chains increasingly favour resilience.

The strongest procurement strategies include:

- Multiple origins
- Multiple processors
- Multiple supply routes

Benefits

Supply Security

Reduces disruption exposure.

Pricing Visibility

Provides broader market intelligence.

Negotiating Strength

Creates commercial flexibility.

Continuity

Improves long-term programme performance.

Strategic Outlook Beyond 2026

The next generation of halal meat procurement will likely be defined by resilience rather than simply lowest cost.

Buyers capable of building diversified supply networks should be better positioned to manage:

- Market volatility
- Freight fluctuations
- Seasonal demand
- Supply shortages

Successful supply programmes will increasingly prioritise:



Conclusion

The international halal lamb market remains full of opportunity for disciplined buyers.

However, price alone is no longer a sufficient procurement strategy.

The strongest performers are increasingly combining:

- Reliable sourcing
- Supplier oversight
- Market intelligence
- Long-term planning
- Multi-origin supply structures

At Vanta Food Group, we believe the future belongs to buyers who manage supply proactively rather than reactively.

The objective is not merely to buy product.

The objective is to build dependable supply systems capable of performing consistently under changing market conditions.

References

Public Market Information

- Kazakhstan Mutton Wholesale Market Price (Tridge) for wholesale lamb pricing data.
- Reports covering lamb price increases in Kazakhstan and associated market drivers.
- Kazakhstan export market observations.
- 2026 dates for Ramadan and Eid al-Adha: Arabian Business; Emirates Astronomy Society.

Industry Participants

- Sydra Global export and market information.
- Holder Trade livestock export capabilities and scale.
- Eurofarm livestock and lamb export operations.

Report Notes

- Pricing examples are illustrative and do not represent quotations.
- Vanta Market Views represent commercial analysis and opinion.
- Importers should independently verify destination-country veterinary and halal requirements.
- Market conditions evolve continuously and may differ by specification, volume, freight conditions and destination.
- Emerging-origin assessments should be validated through supplier qualification and trial shipments before commercial commitments.

Vanta Food Group

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