

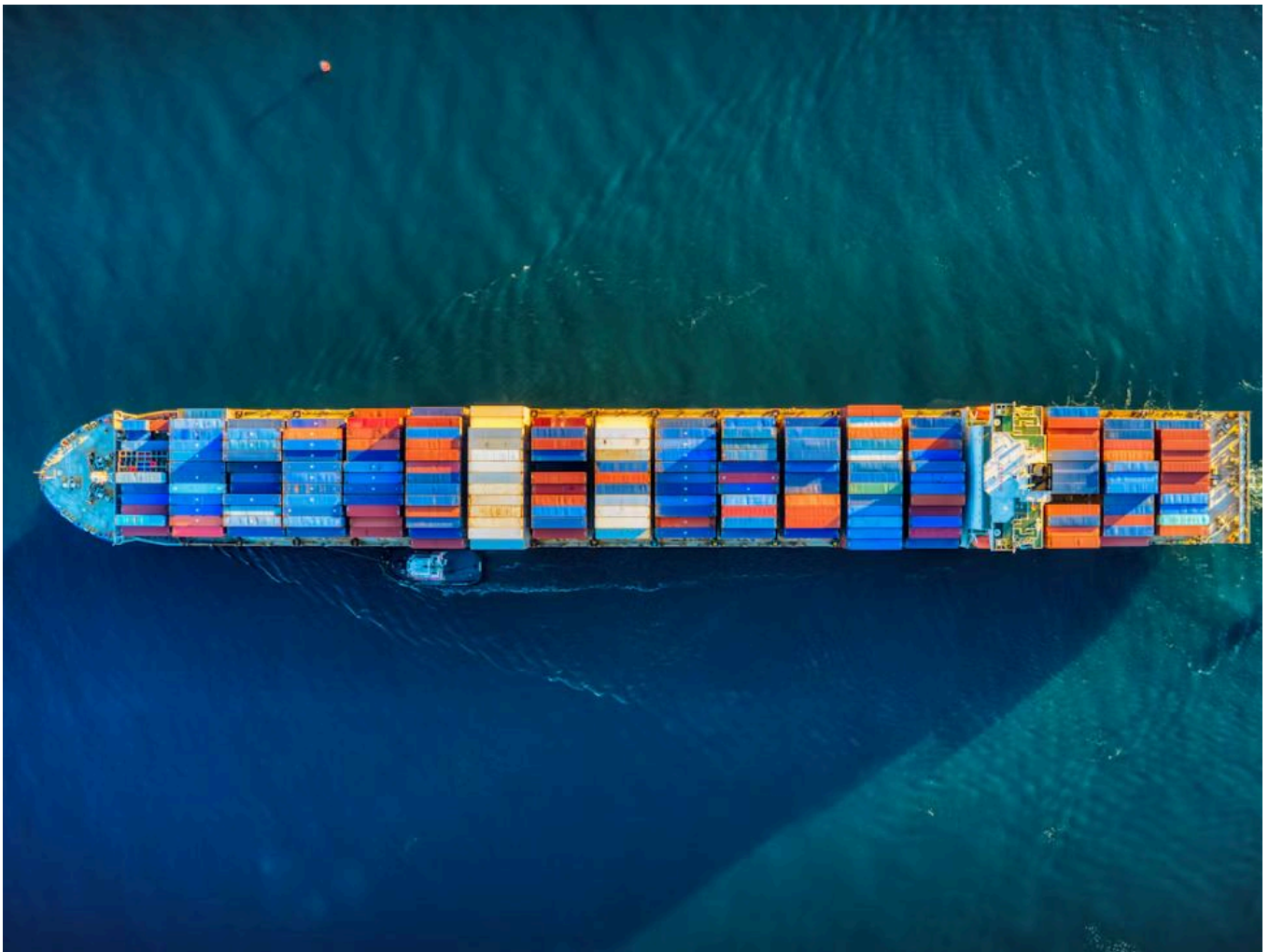
Market Insights

International Halal Lamb Market Outlook

Q2-Q3 2026

Supply Chain Risk, Freight Economics & Strategic Procurement

Prepared by Vanta Food Group



Published by Vanta Food Group · Serving International Markets From London

Executive Summary

The first half of 2026 demonstrated that international halal lamb procurement is becoming increasingly influenced by factors beyond livestock availability alone.

While supply fundamentals remain important, procurement teams are now operating in an environment shaped by freight economics, fuel prices, route reliability, logistics performance, geopolitical uncertainty and changing regional demand patterns.

For many buyers, the challenge is no longer sourcing product.

The challenge is maintaining predictable access to product.

Recent market developments have highlighted the importance of planning, supplier diversification and logistics resilience. Importers that historically relied upon a single supplier or origin market are increasingly evaluating alternative sourcing options in response to changing commercial conditions.

Established origins such as Kazakhstan and Romania continue to play important roles within international halal lamb supply chains. At the same time, emerging opportunities, including Kenya and selected East African markets, are attracting increased attention as buyers seek greater diversification and long-term resilience.

The remainder of 2026 is expected to be characterised by five key themes:

- Greater emphasis on supply continuity.
- Increased focus on landed cost rather than farm-gate price.
- Continued sensitivity to freight and fuel costs.
- Growing interest in multi-origin procurement strategies.
- Increased evaluation of emerging sourcing markets.

At Vanta Food Group, we believe procurement is increasingly becoming a risk-management exercise rather than simply a purchasing exercise.

The buyers that perform best over the next decade are likely to be those capable of building resilient supply programmes designed to withstand changing market conditions.

The New Procurement Environment

The international meat trade has changed significantly in recent years.

Historically, many procurement decisions were driven by three primary considerations:

Price.

Volume.

Delivery.

While these remain important, today's procurement teams are increasingly required to evaluate a much wider range of variables.

Modern supply programmes must account for:

- Freight reliability.
- Fuel exposure.
- Documentation requirements.
- Supplier capability.
- Cold-chain performance.
- Route stability.
- Currency fluctuations.
- Seasonal demand cycles.

These factors influence not only the cost of procurement but also the consistency of supply.

In practical terms, a shipment that appears competitive at origin may become significantly more expensive once transportation, storage, documentation and logistics risks are considered.

As a result, procurement is becoming more strategic.

Professional buyers are investing greater effort into understanding the broader supply environment rather than focusing solely on immediate pricing opportunities.

Vanta Market View

The strongest procurement programmes are built around preparation rather than reaction.

The objective is no longer simply to buy product.

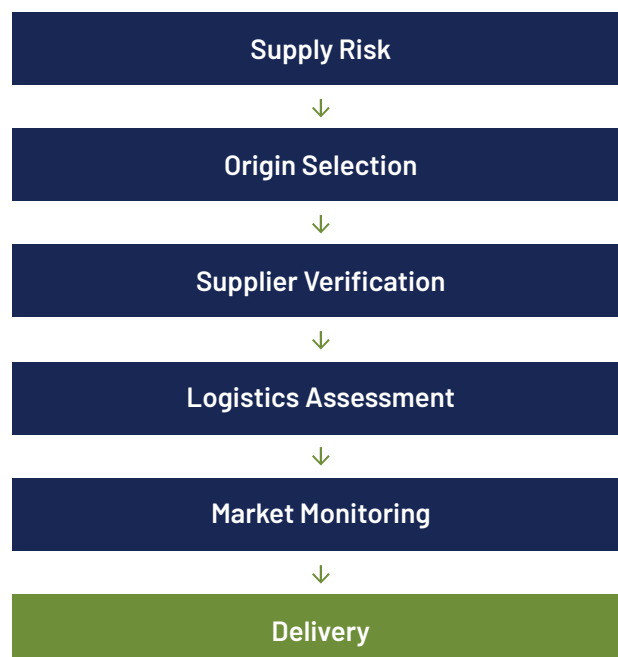
The objective is to create dependable product flow.

How International Procurement Has Changed

Traditional Procurement



Modern Procurement



Trade & Logistics Risk Environment

Throughout 2026, freight markets have remained highly sensitive to regional instability, transportation bottlenecks and changing energy economics.

For food importers, the operational consequences of uncertainty often matter more than the underlying political events themselves.

Disruptions can influence:

- Freight availability.
- Cargo pricing.
- Insurance costs.
- Shipping schedules.
- Route selection.
- Delivery reliability.

The impact becomes particularly significant for chilled programmes where timing is critical and transportation windows are narrow.

Even relatively small increases in transportation costs can materially affect landed product economics.

Frozen supply chains generally demonstrate greater resilience because extended shelf life provides flexibility in inventory planning and shipping schedules.

When logistics disruptions occur, frozen product often provides buyers with additional options unavailable to chilled programmes.

This does not mean chilled supply becomes unattractive.

Rather, it means buyers must carefully evaluate the relationship between product format and supply-chain risk.

Vanta Market View

Supply-chain performance is increasingly becoming a competitive advantage.

The businesses most capable of adapting quickly to changing freight conditions are often the businesses that maintain continuity when competitors experience disruption.

How External Events Influence Procurement Performance


Chilled Versus Frozen Supply Economics

The decision between chilled and frozen product remains one of the most important strategic considerations within halal meat procurement.

Both formats offer distinct advantages.

Chilled lamb provides:

- Premium presentation.
- Rapid market access.
- Strong retail appeal.
- Fresh-product positioning.

However, those advantages rely upon highly efficient transportation and distribution systems.

Chilled programmes typically depend upon shorter transit windows and frequently require air freight solutions.

While frozen programmes may require more long-term planning, they often provide procurement teams with greater strategic flexibility.

Frozen programmes operate differently.

Their advantages include:

- Longer storage life.
- Increased route flexibility.
- Wider origin options.
- Improved inventory management.
- Greater resilience during disruption.

As supply chains become more complex, businesses are increasingly evaluating frozen product not simply as a lower-cost option but as a risk-management tool.

Vanta Market View

The distinction between chilled and frozen procurement is becoming less about product format and more about operational strategy.

Comparative Supply Risk Assessment
Vanta Market View

	Chilled	Frozen
Freight Sensitivity	High	Low
Cost Predictability	Low	High
Storage Flexibility	Low	High
Shelf Life	Low	High
Supply Security	Medium	High
Origin Flexibility	Medium	High
Disruption Resilience	Low	High
Inventory Control	Medium	High

Kazakhstan & Romania Market Update

Kazakhstan

Observed Market Data

Kazakhstan remains one of the most interesting halal lamb origins available to international buyers.

The country benefits from substantial grazing resources, halal production capability and increasing export experience.

However, procurement conditions have become more competitive.

Recent reporting has indicated significant increases in lamb pricing driven by stronger export demand alongside higher feed, fuel and logistics costs.

Sources: fbrk.kz, insights.tridge.com, tridge.com

For buyers, this creates both opportunity and challenge.

Kazakhstan continues to offer attractive long-term potential, but successful procurement increasingly depends upon supplier relationships, planning and execution.

Romania

Observed Market Data

Romania remains one of Europe's most established sheep-producing nations.

The country continues to support extensive halal export activity to Middle Eastern markets through experienced processors and exporters.

Sources: europeanfarmer.com, holdertrade.ro, sydra.ro

Romania's principal advantages remain:

- Scale.
- Processing capability.
- Export maturity.
- Documentation experience.
- Logistics connectivity.

For many importers, Romania continues to provide one of the strongest combinations of reliability and commercial practicality.

Vanta Market View

Kazakhstan offers considerable future potential.

Romania offers proven consistency.

The most resilient procurement strategies may ultimately incorporate both.

Comparative Origin Assessment

Vanta Market View: scores out of 10

■ Kazakhstan ■ Romania



Kenya: Strategic Emerging Origin

Kenya is increasingly appearing in conversations surrounding future halal meat sourcing opportunities.

Although it is not yet regarded internationally in the same category as established origins such as Romania or Kazakhstan, the country possesses several characteristics that merit attention.

These include:

- Significant livestock resources.
- Established halal production traditions.
- Competitive labour economics.
- Geographic relevance to Gulf markets.
- Long-term growth potential.

The opportunity is real.

However, emerging origins require disciplined evaluation.

Infrastructure maturity, cold-chain capability, export experience and documentation standards should always be assessed at supplier level rather than assumed.

For professional buyers, Kenya should currently be viewed as a diversification opportunity rather than a primary sourcing market.

Vanta Market View

Kenya possesses meaningful long-term potential.

The logical approach is gradual development through supplier qualification, facility inspection, documentation review and trial shipments.

Kenya Emerging Origin Assessment

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
Documentation Maturity		6/10
Freight Connectivity		7/10
Growth Potential		8/10

Overall Assessment **7.0/10**

Relative Origin Maturity & Development Potential

Vanta Market View: relative, not a measured score

Established Origins

Romania	
Kazakhstan	

Emerging Origins

Kenya	
-------	------------------------

Future Opportunities

East Africa	
-------------	------------------------

Scenario Planning For The Remainder Of 2026

Forecasting markets with complete accuracy is impossible.

Preparing for multiple potential outcomes is significantly more practical.

Base Case

Demand remains stable.

Freight conditions remain manageable.

Livestock prices remain firm but relatively predictable.

This remains Vanta Food Group's central expectation.

Growth Case

Demand strengthens across Gulf markets.

Additional procurement activity creates increased competition for available supply.

Landed costs rise moderately.

Risk Case

Freight disruptions increase.

Fuel costs rise.

Cargo capacity tightens.

Supply-chain costs accelerate faster than anticipated.

Businesses relying heavily on single-origin procurement strategies face increasing pressure.

Vanta Market View

Scenario planning is becoming increasingly important because procurement decisions are often made months before product is ultimately delivered.

Potential Market Outcomes For H2 2026

Vanta Market View: relative likelihood, not a probability



Strategic Outlook

The halal meat sector continues to present substantial opportunity for organisations capable of building reliable supply programmes.

Demand fundamentals remain strong.

Population growth, food service demand and evolving consumer expectations continue to support the long-term market outlook.

The challenge is increasingly operational.

The companies most likely to succeed will not necessarily be those purchasing the cheapest available lamb.

They will be the organisations capable of managing:

- Multiple suppliers.
- Multiple processors.
- Multiple freight routes.
- Multiple origin markets.

Supply resilience is rapidly becoming one of the most valuable assets available to procurement teams.

The future of halal meat procurement is unlikely to be determined by one supplier, one processor or one country.

It will be determined by the ability to maintain continuity under changing conditions.

Vanta Food Group believes that successful procurement rests upon four foundations:

Availability.

Quality.

Pricing.

Delivery.

When these four elements are managed consistently, buyers gain confidence, suppliers gain stability and supply programmes become stronger over time.

Building Sustainable Supply Programmes

Supplier Diversification



Supply Resilience



Operational Continuity



Buyer Confidence



Long-Term Growth

References

Market information relating to Kazakhstan livestock pricing and market conditions:

- Kazakhstan wholesale lamb pricing data. tridge.com
- Reporting on rising lamb prices driven by export demand and rising costs. fbrk.kz, insights.tridge.com

Industry information relating to Romanian export capability:

- Eurofarm. europeanfarmer.com
- Holder Trade. holdertrade.ro
- Sydra Global. sydra.ro, sydra.ro/about-us

Report Notes

- Observed Market Data represents publicly available information and documented market developments.
- Vanta Market View sections represent commercial analysis and opinion.
- Pricing examples and scenario analysis are illustrative and do not constitute quotations.
- Importers should independently verify destination-country veterinary, halal and import requirements.
- Market conditions may change without notice.

Vanta Food Group

Trusted Supply. Proven Standards.

Serving International Markets From London

admin@vantafoodgroup.com · www.vantafoodgroup.com