



# Consumer Foodservice in Middle East and Africa

June 2024

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Scope

Key findings

## REGIONAL OVERVIEW

Full-service and limited-service restaurants most popular in Middle East and Africa

Middle East and Africa has the fifth biggest market and lowest per capita spend

Consumer foodservice expected to reach its 2019 value sales levels again in 2025

Post-pandemic recovery being stymied by an inflationary environment

Big dip in consumer foodservice value sales in Nigeria in 2023

Takeaway popular in Nigeria and South Africa, delivery in Israel and Saudi Arabia

Consumer foodservice industry records major losses over 2018-2023

Vision 2030 and full resumption of religious pilgrimages boost sales in Saudi Arabia

Israel and Nigeria experiencing declining sales at the end of the review period

## LEADING COMPANIES AND BRANDS

Consumer foodservice has a very fragmented competitive landscape in most countries

Independent players working with delivery apps to expand their non-eat-in offer

Saudi Arabia the main revenue generator for over half of the region's top 10 players

Leading brands adding new outlets in Saudi Arabia in 2023

## FORECAST PROJECTIONS

Positive growth expected throughout the forecast period

Vision 2030 will help to continue driving growth in Saudi Arabia

Delivery and takeaway expected to continue growing across the region

## COUNTRY SNAPSHOTS

Egypt: Market Context

Egypt: Competitive and Retail Landscape

Israel: Market Context

Israel: Competitive and Retail Landscape

Morocco: Market Context

Morocco: Competitive and Retail Landscape

Nigeria: Market Context

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United Arab Emirates: Market Context

United Arab Emirates: Competitive and Retail Landscape

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