



Passport

Staple Foods in the United Arab Emirates

Euromonitor International

December 2021

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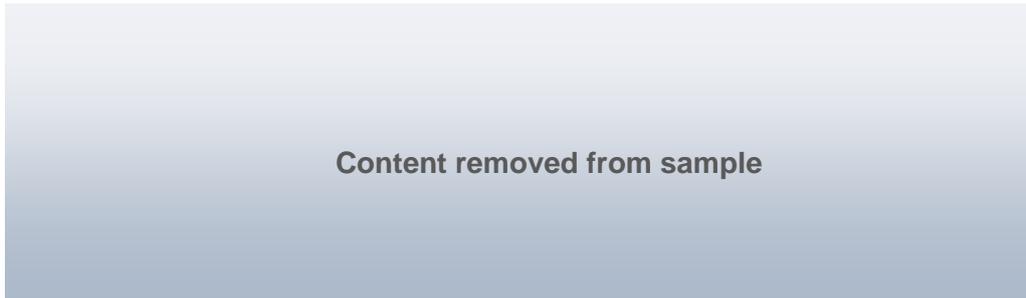
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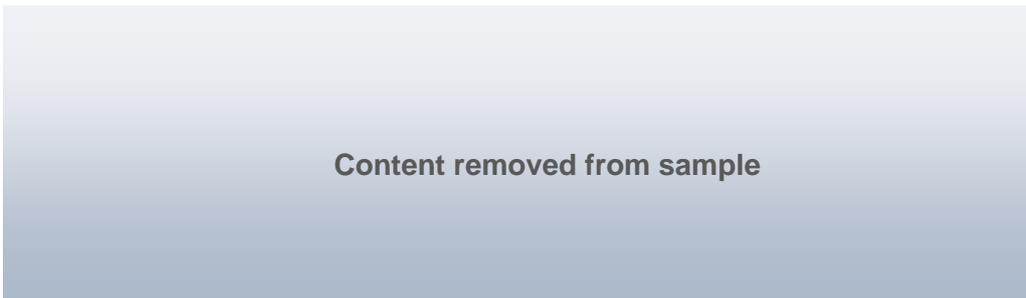
STAPLE FOODS IN THE UNITED ARAB EMIRATES - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

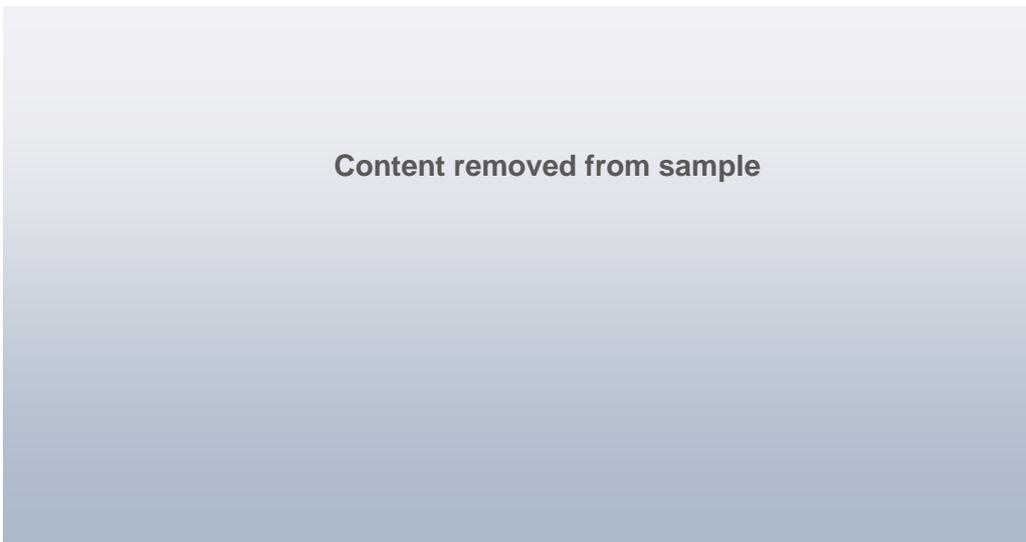
Staple foods in 2021: The big picture



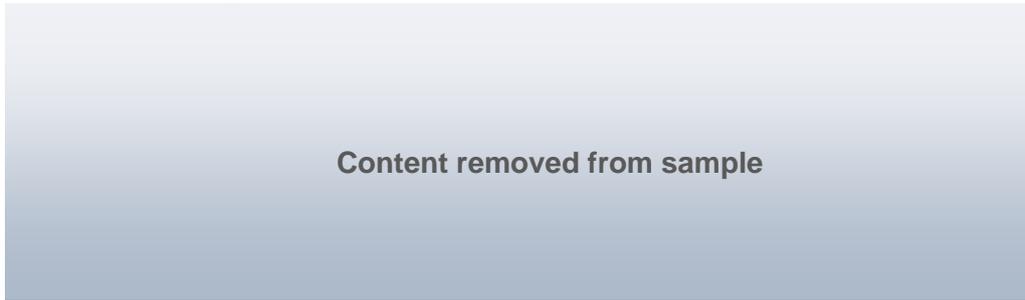
Key trends in 2021



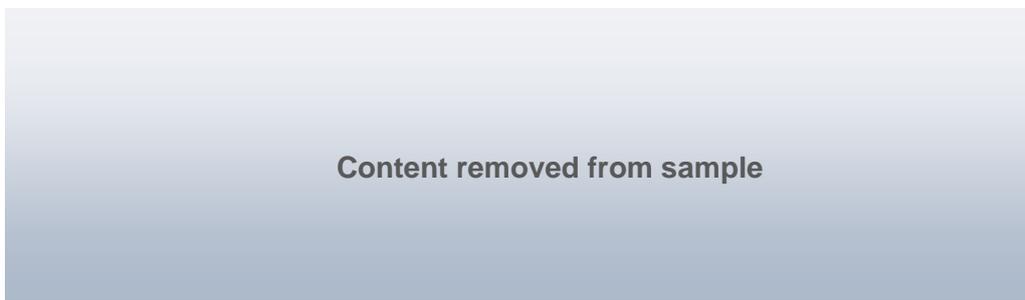
Competitive landscape



Channel developments



What next for staple foods?



MARKET DATA

Table 1 Sales of Staple Foods by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Baked Goods	Data removed from sample					
Breakfast Cereals						
Processed Fruit and Vegetables						
Processed Meat, Seafood and Alternatives to Meat						
Rice, Pasta and Noodles						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Staple Foods by Category: Value 2016-2021

AED million	2016	2017	2018	2019	2020	2021
Baked Goods	Data removed from sample					
Breakfast Cereals						
Processed Fruit and Vegetables						
Processed Meat, Seafood						

and Alternatives to Meat
Rice, Pasta and Noodles

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Staple Foods by Category: % Volume Growth 2016-2021

% volume growth

2020/21 2016-21 CAGR 2016/21 Total

Staple Foods
Baked Goods
Breakfast Cereals
Processed Fruit and Vegetables
Processed Meat, Seafood and
Alternatives to Meat
Rice, Pasta and Noodles

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Staple Foods by Category: % Value Growth 2016-2021

% current value growth

2020/21 2016-21 CAGR 2016/21 Total

Staple Foods
Baked Goods
Breakfast Cereals
Processed Fruit and Vegetables
Processed Meat, Seafood and
Alternatives to Meat
Rice, Pasta and Noodles

Data removed from sample

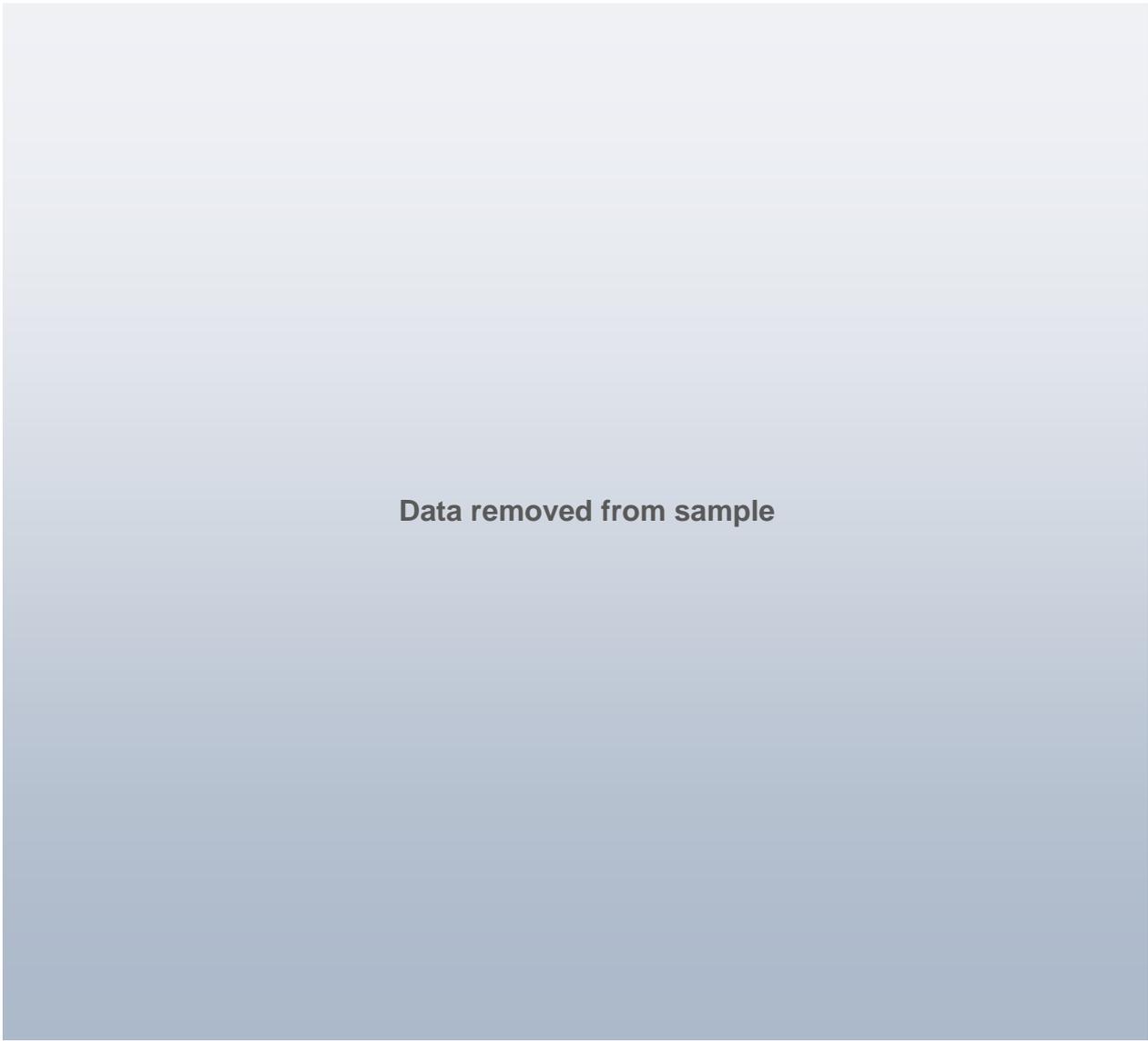
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 NBO Company Shares of Staple Foods: % Value 2017-2021

% retail value rsp

Company 2017 2018 2019 2020 2021

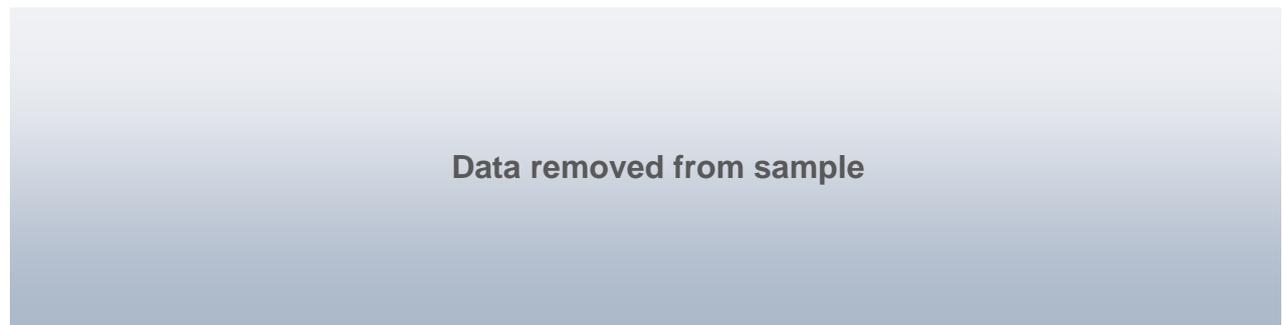
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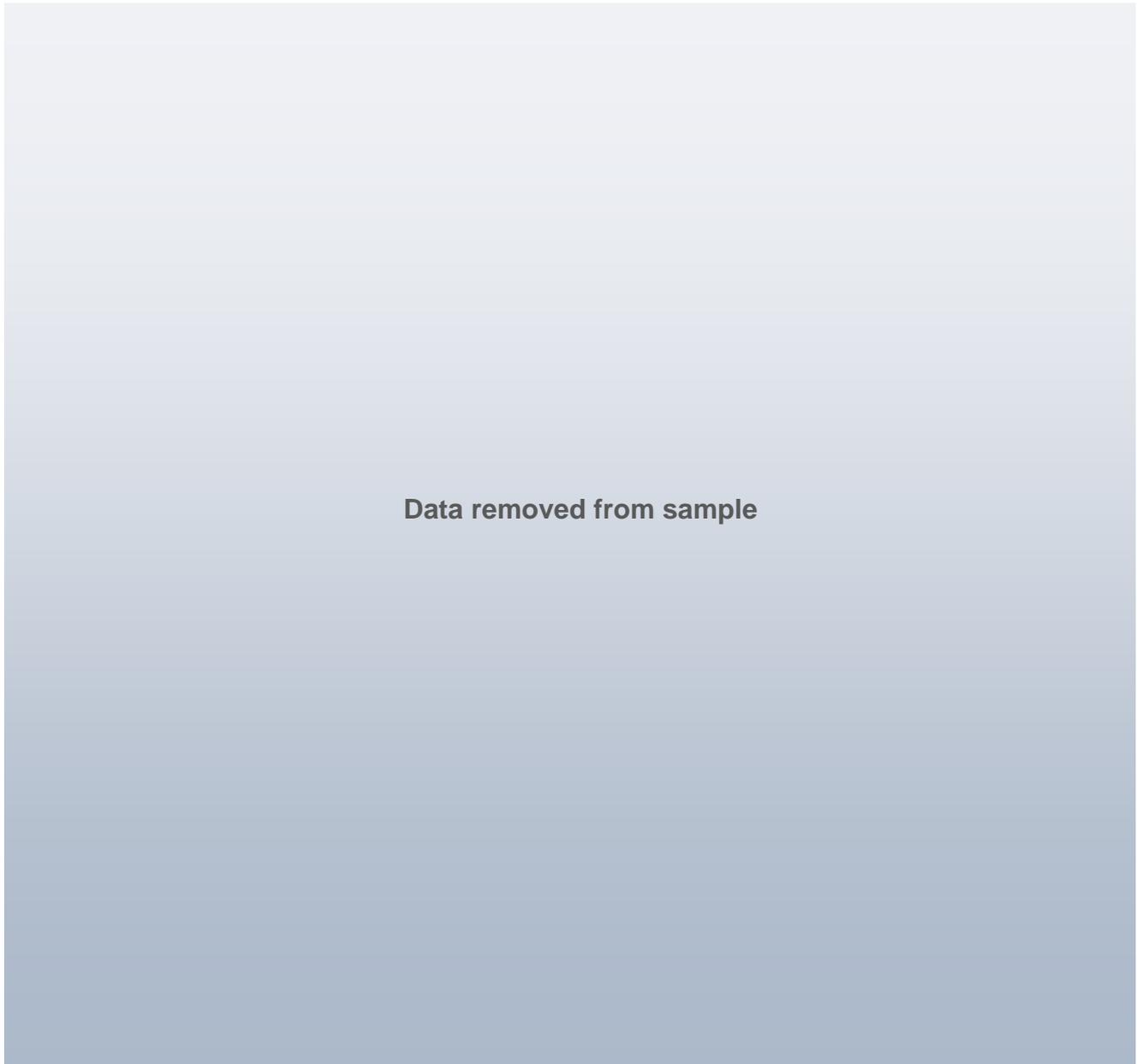


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Staple Foods: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Penetration of Private Label by Category: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Baked Goods	Data removed from sample					
Processed Fruit and Vegetables						
Processed Meat, Seafood						

and Alternatives to Meat
Rice, Pasta and Noodles

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Distribution of Staple Foods by Format: % Value 2016-2021

% retail value rsp

	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other Foods Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Forecast Sales of Staple Foods by Category: Volume 2021-2026

'000 tonnes

	2021	2022	2023	2024	2025	2026
Baked Goods	Data removed from sample					
Breakfast Cereals						
Processed Fruit and Vegetables						
Processed Meat, Seafood and Alternatives to Meat						
Rice, Pasta and Noodles						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales of Staple Foods by Category: Value 2021-2026

AED million	2021	2022	2023	2024	2025	2026
Baked Goods	Data removed from sample					
Breakfast Cereals						
Processed Fruit and Vegetables						
Processed Meat, Seafood and Alternatives to Meat						
Rice, Pasta and Noodles						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales of Staple Foods by Category: % Volume Growth 2021-2026

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Staple Foods	Data removed from sample		
Baked Goods			
Breakfast Cereals			
Processed Fruit and Vegetables			
Processed Meat, Seafood and Alternatives to Meat			
Rice, Pasta and Noodles			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 12 Forecast Sales of Staple Foods by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Staple Foods	Data removed from sample		
Baked Goods			
Breakfast Cereals			
Processed Fruit and Vegetables			
Processed Meat, Seafood and Alternatives to Meat			
Rice, Pasta and Noodles			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

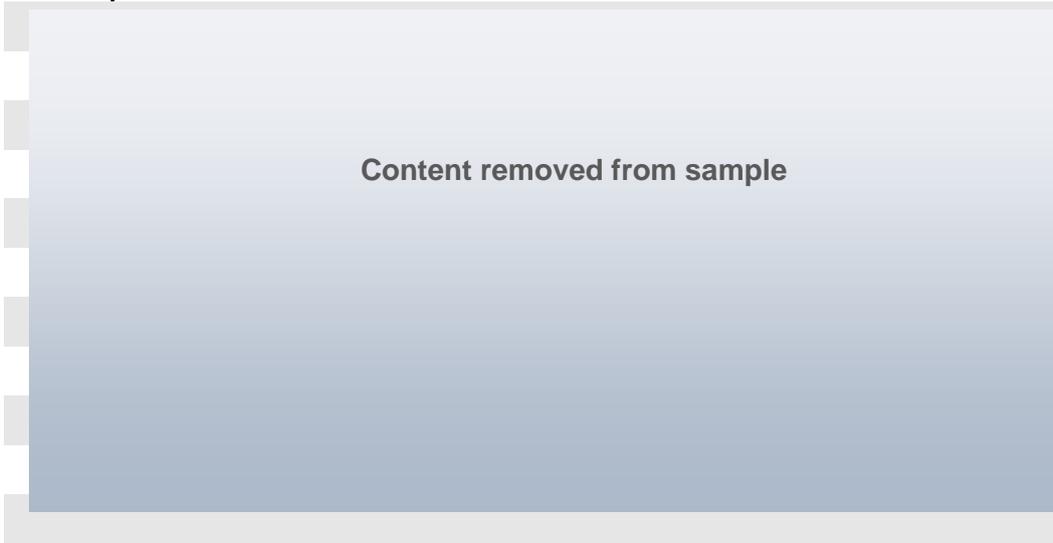
DISCLAIMER

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SOURCES

Sources used during research include the following:

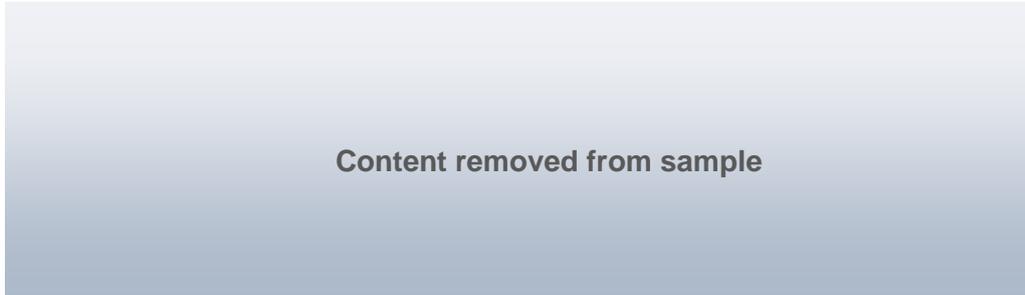
Summary 1 Research Sources



Source: Euromonitor International

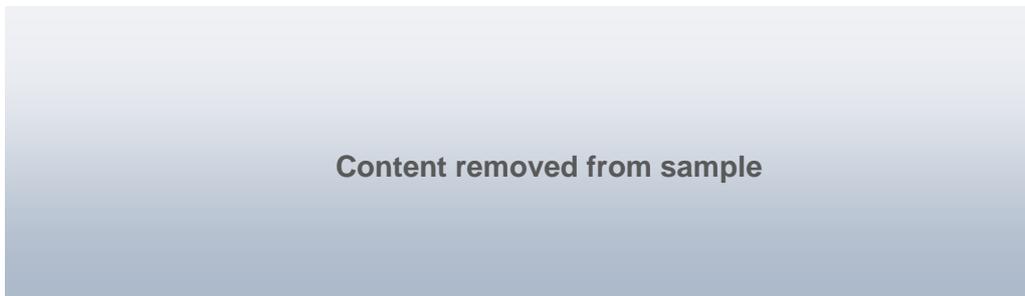
BAKED GOODS IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

KEY DATA FINDINGS

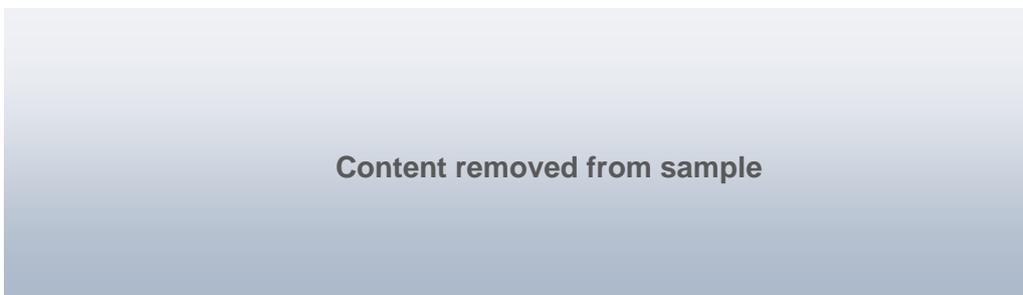


2021 DEVELOPMENTS

Return to foodservice and increasing mobility reverse 2020 category dynamics

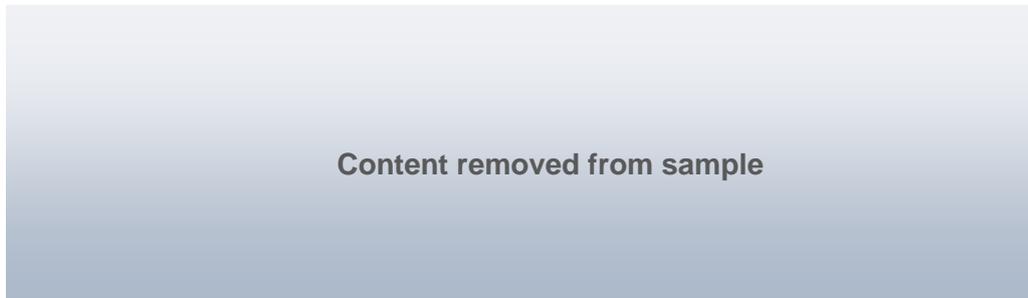


Dessert mixes experiences A drop compared to 2020's exponential growth

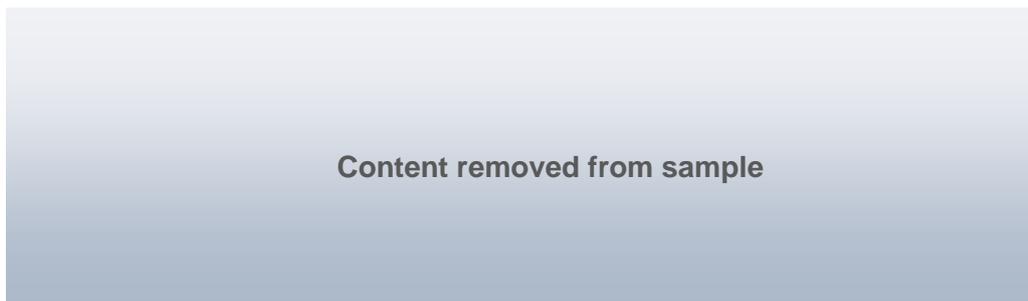


PROSPECTS AND OPPORTUNITIES

Healthy claims to inspire innovation and the launch of new products



Bricks-and-mortar appeal remains strong for consumers seeking fresh hot bakery items



CATEGORY DATA

Table 13 Sales of Baked Goods by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Baked Goods	Data removed from sample					
Bread						
- Flat Bread						
-- Packaged Flat Bread						
-- Unpackaged Flat Bread						
- Leavened Bread						
-- Packaged Leavened Bread						
-- Unpackaged Leavened Bread						
Cakes						
- Packaged Cakes						
- Unpackaged Cakes						

- Dessert Mixes
- Frozen Baked Goods
- Pastries
 - Packaged Pastries
 - Unpackaged Pastries



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Sales of Baked Goods by Category: Value 2016-2021

AED million

	2016	2017	2018	2019	2020	2021
Baked Goods	Data removed from sample					
Bread						
- Flat Bread						
-- Packaged Flat Bread						
-- Unpackaged Flat Bread						
- Leavened Bread						
-- Packaged Leavened Bread						
-- Unpackaged Leavened Bread						
Cakes						
- Packaged Cakes						
- Unpackaged Cakes						
Dessert Mixes						
Frozen Baked Goods						
Pastries						
- Packaged Pastries						
- Unpackaged Pastries						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Sales of Baked Goods by Category: % Volume Growth 2016-2021

% volume growth

	2020/21	2016-21 CAGR	2016/21 Total
Baked Goods	Data removed from sample		
Bread			
- Flat Bread			
-- Packaged Flat Bread			
-- Unpackaged Flat Bread			
- Leavened Bread			
-- Packaged Leavened Bread			
-- Unpackaged Leavened Bread			
Cakes			
- Packaged Cakes			
- Unpackaged Cakes			
Dessert Mixes			
Frozen Baked Goods			
Pastries			
- Packaged Pastries			
- Unpackaged Pastries			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

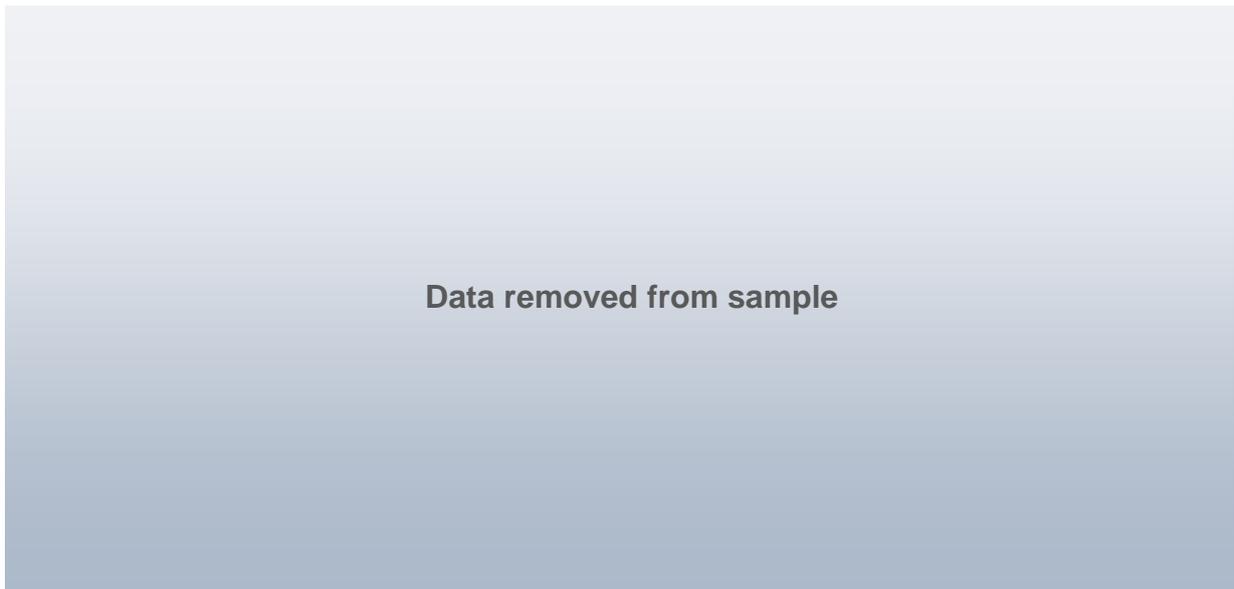
Table 16 Sales of Baked Goods by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Baked Goods	Data removed from sample		
Bread			
- Flat Bread			
-- Packaged Flat Bread			
-- Unpackaged Flat Bread			
- Leavened Bread			
-- Packaged Leavened Bread			
-- Unpackaged Leavened Bread			
Cakes			
- Packaged Cakes			
- Unpackaged Cakes			
Dessert Mixes			
Frozen Baked Goods			
Pastries			
- Packaged Pastries			
- Unpackaged Pastries			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 NBO Company Shares of Baked Goods: % Value 2017-2021

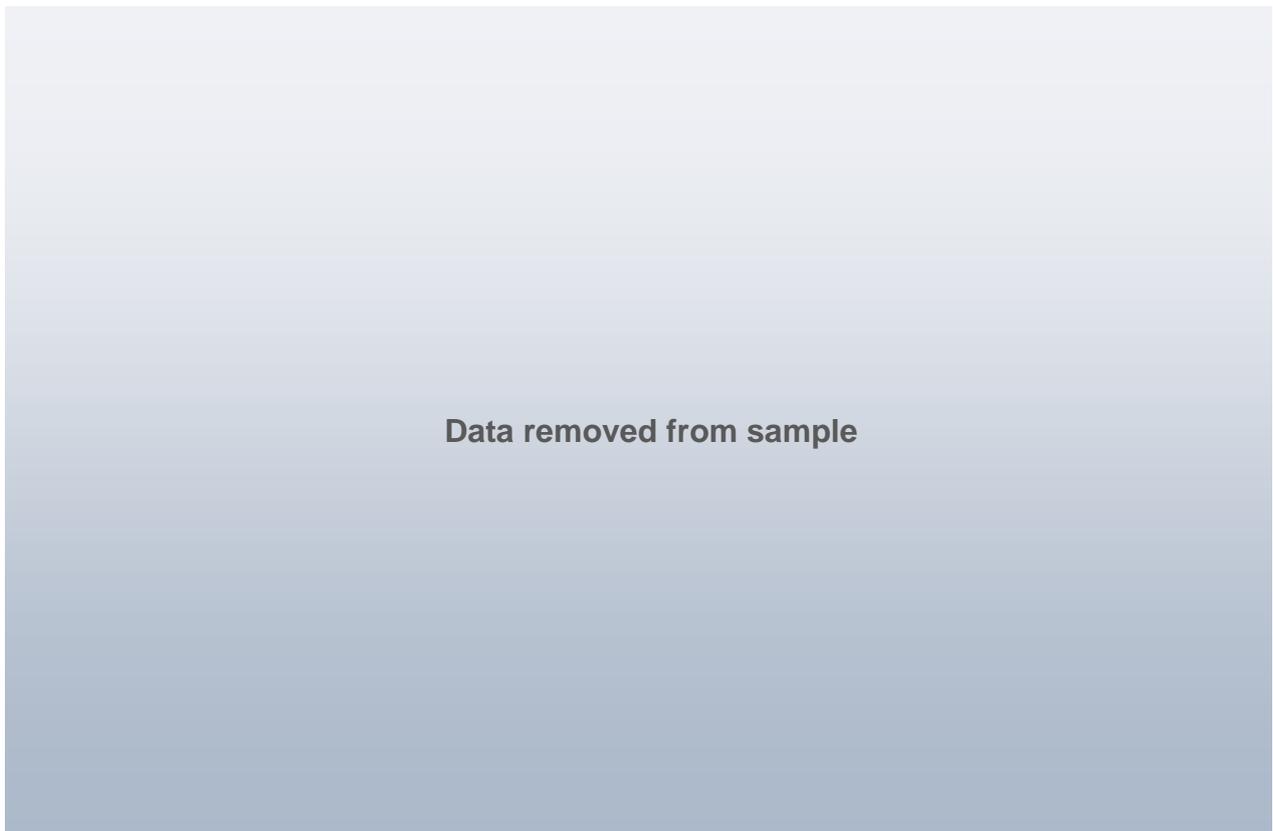
% retail value rsp	2017	2018	2019	2020	2021
Company	Data removed from sample				

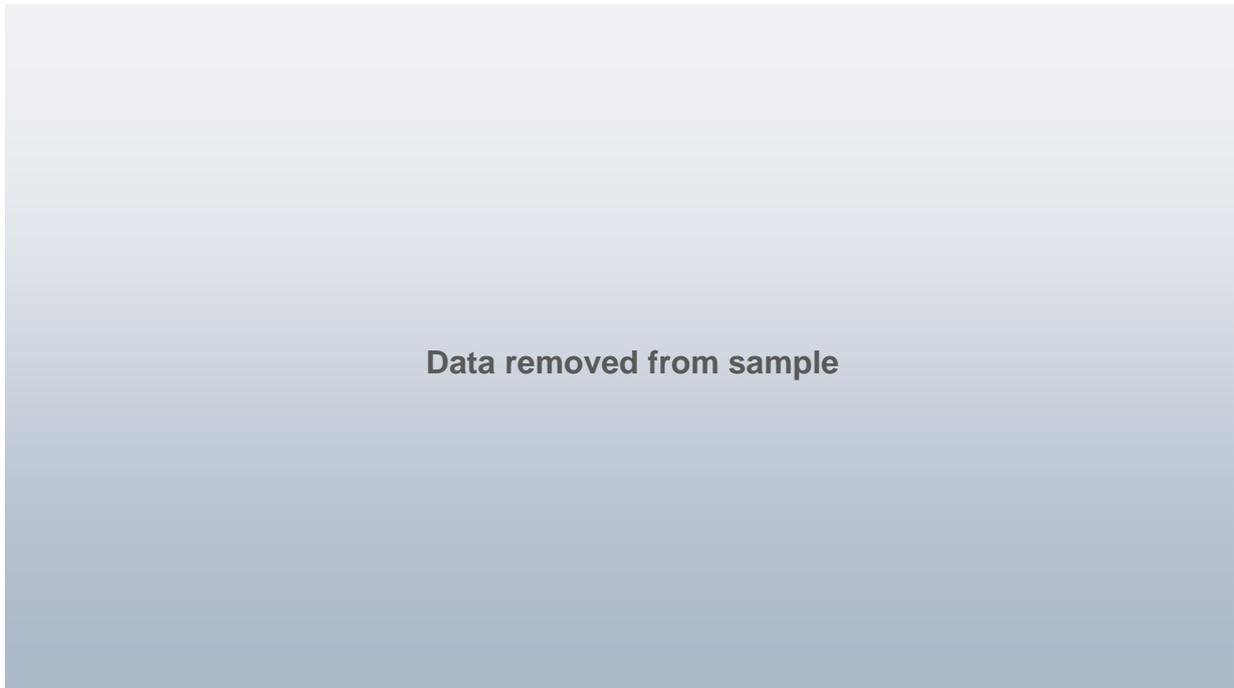


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 LBN Brand Shares of Baked Goods: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------





Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Distribution of Baked Goods by Format: % Value 2016-2021

% retail value rsp

	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other Foods Non-Grocery Specialists						
- Mixed Retailers						

- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Forecast Sales of Baked Goods by Category: Volume 2021-2026

'000 tonnes

	2021	2022	2023	2024	2025	2026
Baked Goods	Data removed from sample					
Bread						
- Flat Bread						
-- Packaged Flat Bread						
-- Unpackaged Flat Bread						
- Leavened Bread						
-- Packaged Leavened Bread						
-- Unpackaged Leavened Bread						
Cakes						
- Packaged Cakes						
- Unpackaged Cakes						
Dessert Mixes						
Frozen Baked Goods						
Pastries						
- Packaged Pastries						
- Unpackaged Pastries						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Baked Goods by Category: Value 2021-2026

AED million

	2021	2022	2023	2024	2025	2026
Baked Goods	Data removed from sample					
Bread						
- Flat Bread						
-- Packaged Flat Bread						
-- Unpackaged Flat Bread						
- Leavened Bread						
-- Packaged Leavened Bread						
-- Unpackaged Leavened Bread						
Cakes						
- Packaged Cakes						
- Unpackaged Cakes						
Dessert Mixes						
Frozen Baked Goods						
Pastries						
- Packaged Pastries						

- Unpackaged Pastries

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Baked Goods by Category: % Volume Growth 2021-2026

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Baked Goods	Data removed from sample		
Bread			
- Flat Bread			
-- Packaged Flat Bread			
-- Unpackaged Flat Bread			
- Leavened Bread			
-- Packaged Leavened Bread			
-- Unpackaged Leavened Bread			
Cakes			
- Packaged Cakes			
- Unpackaged Cakes			
Dessert Mixes			
Frozen Baked Goods			
Pastries			
- Packaged Pastries			
- Unpackaged Pastries			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

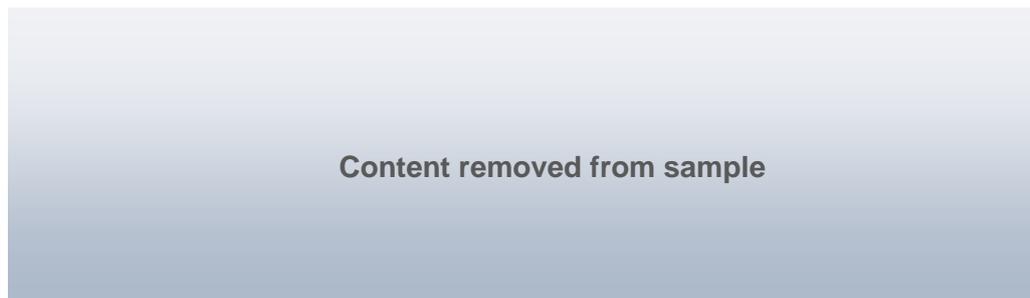
Table 23 Forecast Sales of Baked Goods by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Baked Goods	Data removed from sample		
Bread			
- Flat Bread			
-- Packaged Flat Bread			
-- Unpackaged Flat Bread			
- Leavened Bread			
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-- Unpackaged Leavened Bread			
Cakes			
- Packaged Cakes			
- Unpackaged Cakes			
Dessert Mixes			
Frozen Baked Goods			
Pastries			
- Packaged Pastries			
- Unpackaged Pastries			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

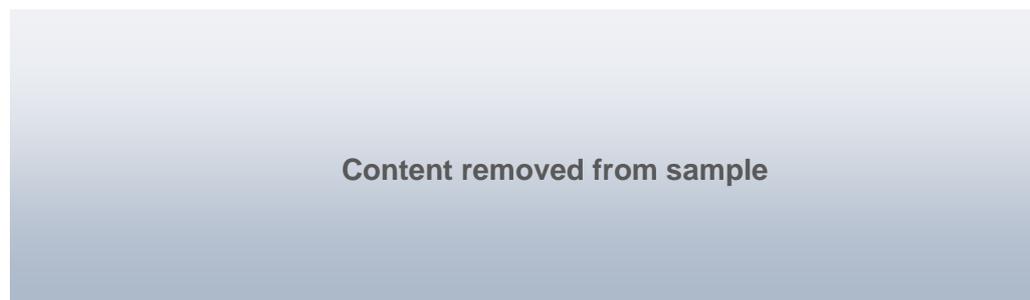
BREAKFAST CEREALS IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

KEY DATA FINDINGS

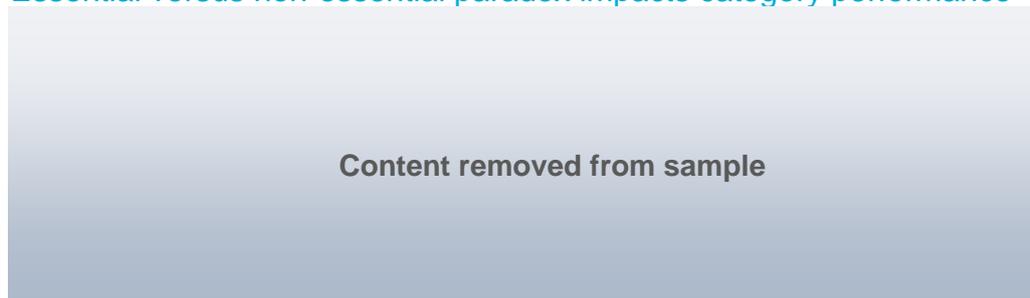


2021 DEVELOPMENTS

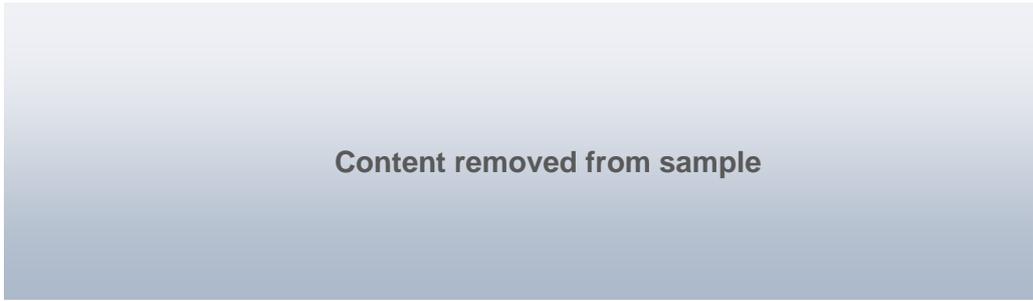
Foodservice reopening sets the tone for strong performance



Essential versus non-essential paradox impacts category performance

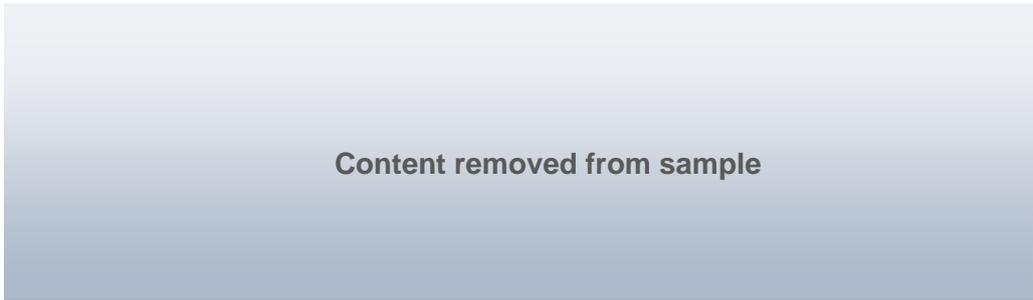


Nostalgic indulgence supports growth during pandemic

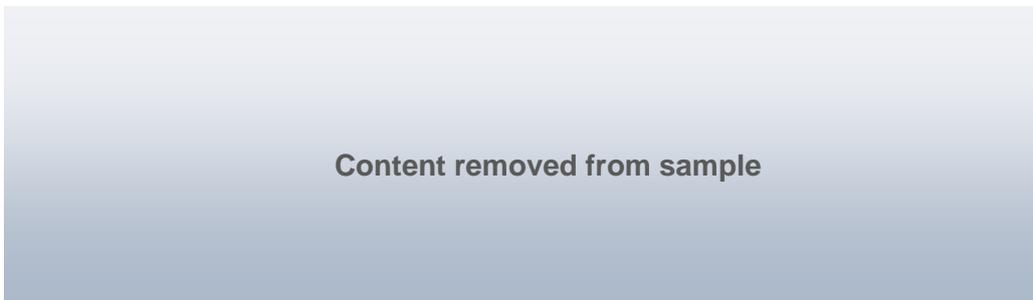


PROSPECTS AND OPPORTUNITIES

Health-centric offers pave the way for category innovation



Adopting e-commerce purchases leverages growth possibilities



CATEGORY DATA

Table 24 Sales of Breakfast Cereals by Category: Volume 2016-2021

'000 tonnes

	2016	2017	2018	2019	2020	2021
Breakfast Cereals	Data removed from sample					
Hot Cereals						
RTE Cereals						
- Children's Breakfast Cereals						
- Family Breakfast Cereals						

- Flakes
- Muesli and Granola
- Other RTE Cereals

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 25 Sales of Breakfast Cereals by Category: Value 2016-2021

AED million

	2016	2017	2018	2019	2020	2021
Breakfast Cereals	Data removed from sample					
Hot Cereals						
RTE Cereals						
- Children's Breakfast Cereals						
- Family Breakfast Cereals						
-- Flakes						
-- Muesli and Granola						
-- Other RTE Cereals						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 26 Sales of Breakfast Cereals by Category: % Volume Growth 2016-2021

% volume growth

	2020/21	2016-21 CAGR	2016/21 Total
Breakfast Cereals	Data removed from sample		
Hot Cereals			
RTE Cereals			
- Children's Breakfast Cereals			
- Family Breakfast Cereals			
-- Flakes			
-- Muesli and Granola			
-- Other RTE Cereals			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 27 Sales of Breakfast Cereals by Category: % Value Growth 2016-2021

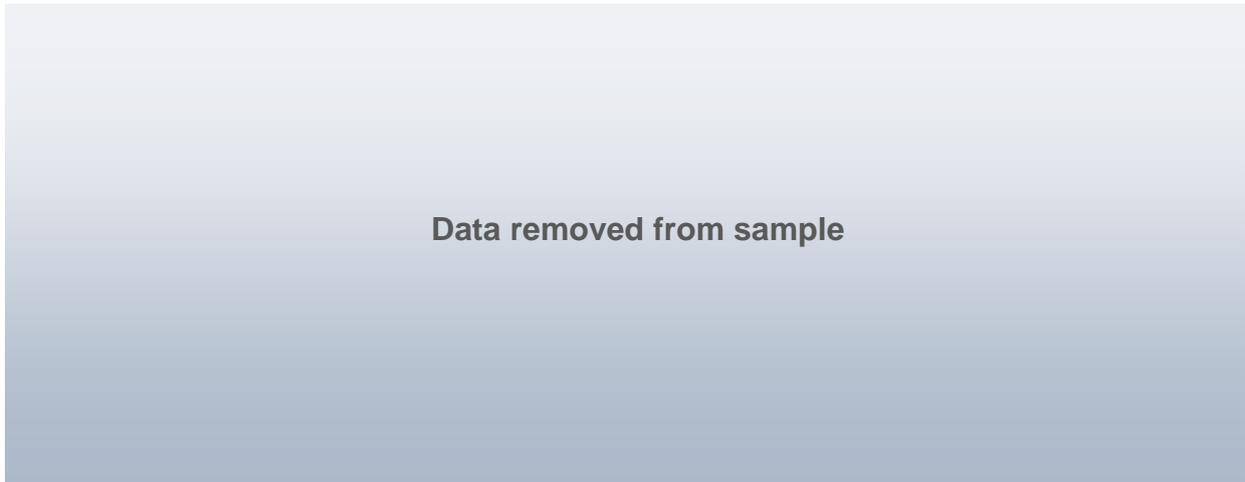
% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Breakfast Cereals	Data removed from sample		
Hot Cereals			
RTE Cereals			
- Children's Breakfast Cereals			
- Family Breakfast Cereals			
-- Flakes			
-- Muesli and Granola			
-- Other RTE Cereals			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 28 NBO Company Shares of Breakfast Cereals: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 29 LBN Brand Shares of Breakfast Cereals: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 30 Distribution of Breakfast Cereals by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other Foods Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 31 Forecast Sales of Breakfast Cereals by Category: Volume 2021-2026

'000 tonnes	2021	2022	2023	2024	2025	2026
Breakfast Cereals	Data removed from sample					
Hot Cereals						
RTE Cereals						
- Children's Breakfast Cereals						
- Family Breakfast Cereals						
-- Flakes						
-- Muesli and Granola						
-- Other RTE Cereals						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 32 Forecast Sales of Breakfast Cereals by Category: Value 2021-2026

AED million	2021	2022	2023	2024	2025	2026
Breakfast Cereals	Data removed from sample					
Hot Cereals						
RTE Cereals						
- Children's Breakfast Cereals						
- Family Breakfast Cereals						
-- Flakes						
-- Muesli and Granola						
-- Other RTE Cereals						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 33 Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2021-2026

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Breakfast Cereals	Data removed from sample		
Hot Cereals			
RTE Cereals			
- Children's Breakfast Cereals			
- Family Breakfast Cereals			
-- Flakes			
-- Muesli and Granola			
-- Other RTE Cereals			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

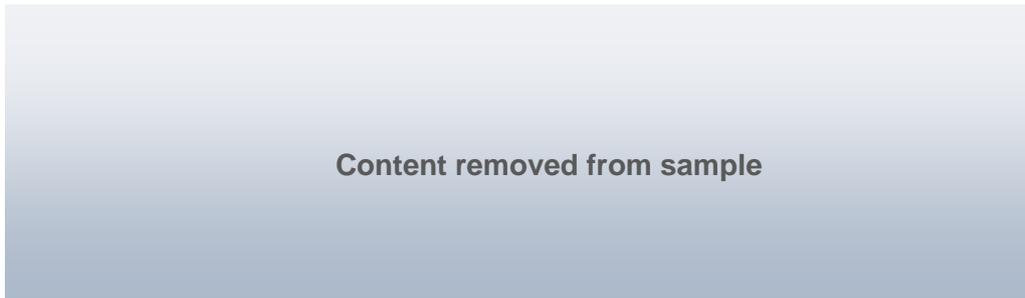
Table 34 Forecast Sales of Breakfast Cereals by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Breakfast Cereals	Data removed from sample		
Hot Cereals			
RTE Cereals			
- Children's Breakfast Cereals			
- Family Breakfast Cereals			
-- Flakes			
-- Muesli and Granola			
-- Other RTE Cereals			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

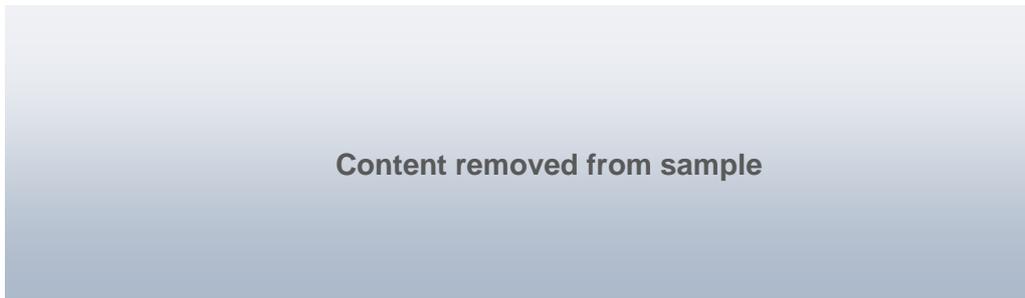
PROCESSED FRUIT AND VEGETABLES IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

KEY DATA FINDINGS

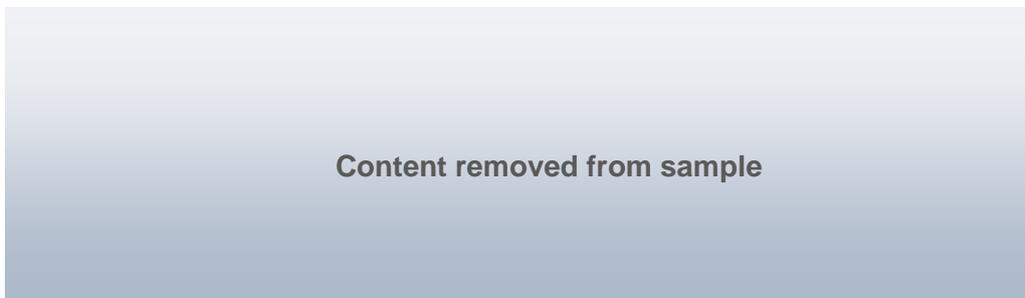


2021 DEVELOPMENTS

Shelf stable segment experiences reverse consumption trend in 2021

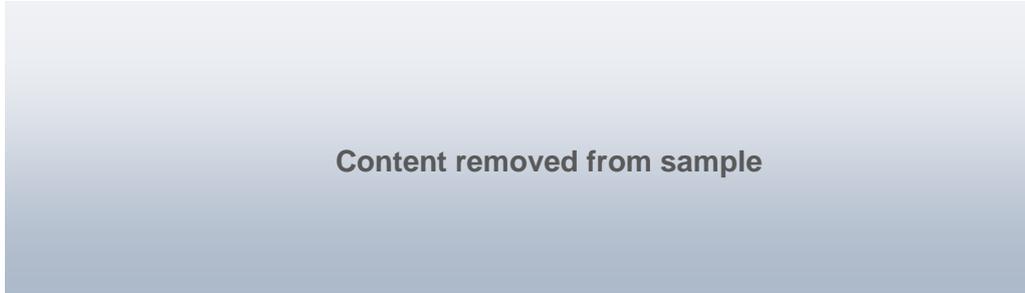


E-commerce exposure creates new horizons for frozen processed fruit

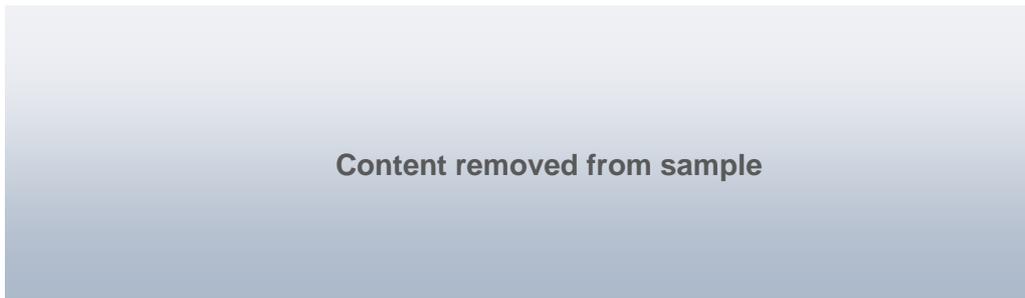


PROSPECTS AND OPPORTUNITIES

Health-centric consumers to boost demand over the forecast period



Strong growth prospects for frozen processed potatoes over forecast period



CATEGORY DATA

Table 35 Sales of Processed Fruit and Vegetables by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Processed Fruit and Vegetables	Data removed from sample					
Shelf Stable Fruit and Vegetables						
- Shelf Stable Beans						
- Shelf Stable Fruit						
- Shelf Stable Tomatoes						
- Shelf Stable Vegetables						
Frozen Processed Fruit and Vegetables						
- Frozen Fruit						
- Frozen Processed						

Potatoes
- Frozen Processed
Vegetables

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 36 Sales of Processed Fruit and Vegetables by Category: Value 2016-2021

AED million

	2016	2017	2018	2019	2020	2021
Processed Fruit and Vegetables	Data removed from sample					
Shelf Stable Fruit and Vegetables						
- Shelf Stable Beans						
- Shelf Stable Fruit						
- Shelf Stable Tomatoes						
- Shelf Stable Vegetables						
Frozen Processed Fruit and Vegetables						
- Frozen Fruit						
- Frozen Processed Potatoes						
- Frozen Processed Vegetables						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 37 Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2016-2021

% volume growth

	2020/21	2016-21 CAGR	2016/21 Total
Processed Fruit and Vegetables	Data removed from sample		
Shelf Stable Fruit and Vegetables			
- Shelf Stable Beans			
- Shelf Stable Fruit			
- Shelf Stable Tomatoes			
- Shelf Stable Vegetables			
Frozen Processed Fruit and Vegetables			
- Frozen Fruit			
- Frozen Processed Potatoes			
- Frozen Processed Vegetables			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 38 Sales of Processed Fruit and Vegetables by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Processed Fruit and Vegetables	Data removed from sample		

Shelf Stable Fruit and Vegetables

- Shelf Stable Beans
- Shelf Stable Fruit
- Shelf Stable Tomatoes
- Shelf Stable Vegetables

Frozen Processed Fruit and Vegetables

- Frozen Fruit
- Frozen Processed Potatoes
- Frozen Processed Vegetables

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 39 Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2016-2021

% retail value rsp

	2016	2017	2018	2019	2020	2021
Artichoke	Data removed from sample					
Corn						
Green Beans						
Mixed Packs						
Molokhia						
Okra						
Onion Rings						
Peas						
Spinach						
Others						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 40 NBO Company Shares of Processed Fruit and Vegetables: % Value 2017-2021

% retail value rsp

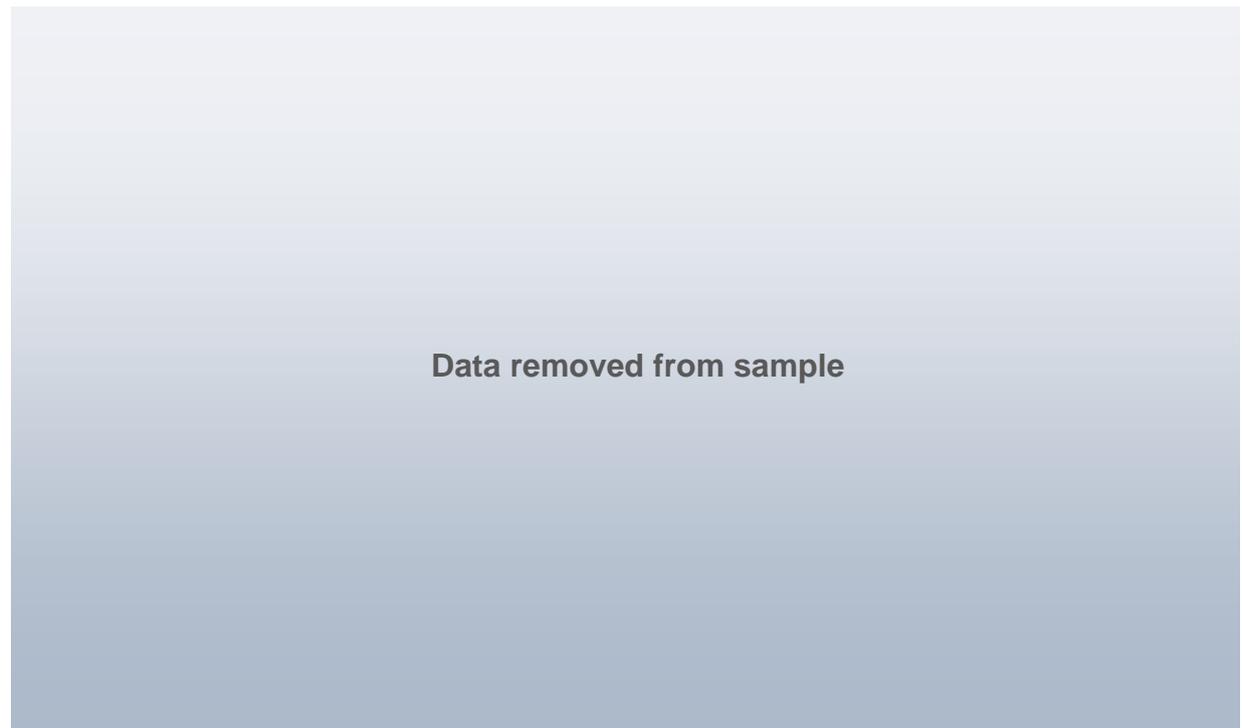
Company	2017	2018	2019	2020	2021
Data removed from sample					

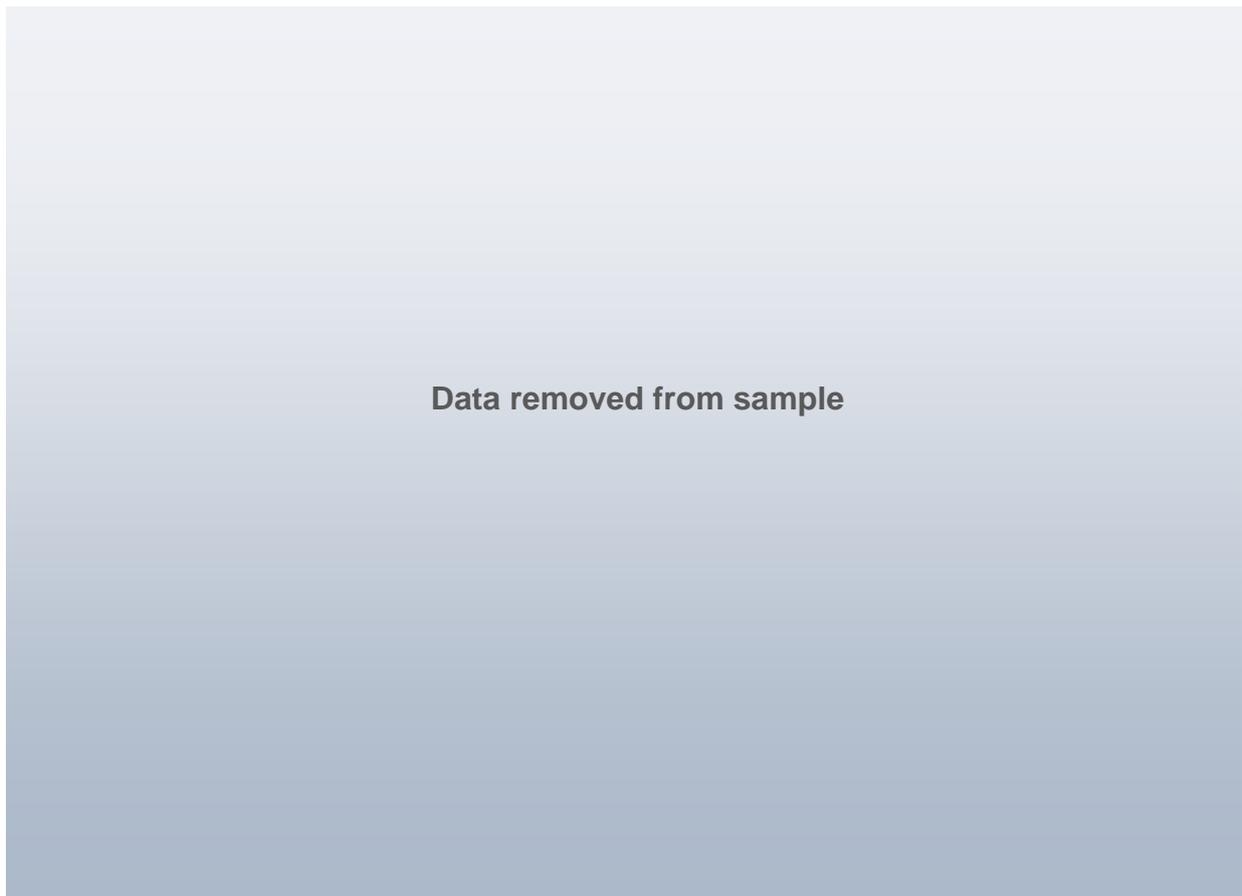


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 41 LBN Brand Shares of Processed Fruit and Vegetables: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 42 Distribution of Processed Fruit and Vegetables by Format: % Value 2016-2021

% retail value rsp

	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Non-Grocery Specialists						

- Health and Beauty Specialist Retailers
- Other Foods Non-Grocery Specialists
- Mixed Retailers
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 43 Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2021-2026

'000 tonnes

	2021	2022	2023	2024	2025	2026
Processed Fruit and Vegetables	Data removed from sample					
Shelf Stable Fruit and Vegetables						
- Shelf Stable Beans						
- Shelf Stable Fruit						
- Shelf Stable Tomatoes						
- Shelf Stable Vegetables						
Frozen Processed Fruit and Vegetables						
- Frozen Fruit						
- Frozen Processed Potatoes						
- Frozen Processed Vegetables						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 44 Forecast Sales of Processed Fruit and Vegetables by Category: Value 2021-2026

AED million

	2021	2022	2023	2024	2025	2026
Processed Fruit and Vegetables	Data removed from sample					
Shelf Stable Fruit and Vegetables						
- Shelf Stable Beans						
- Shelf Stable Fruit						
- Shelf Stable Tomatoes						
- Shelf Stable Vegetables						
Frozen Processed Fruit and Vegetables						
- Frozen Fruit						
- Frozen Processed Potatoes						

- Frozen Processed Vegetables

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 45 Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2021-2026

% volume growth

2021/22 2021-26 CAGR 2021/26 Total

- Processed Fruit and Vegetables
- Shelf Stable Fruit and Vegetables
- Shelf Stable Beans
- Shelf Stable Fruit
- Shelf Stable Tomatoes
- Shelf Stable Vegetables
- Frozen Processed Fruit and Vegetables
- Frozen Fruit
- Frozen Processed Potatoes
- Frozen Processed Vegetables

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 46 Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

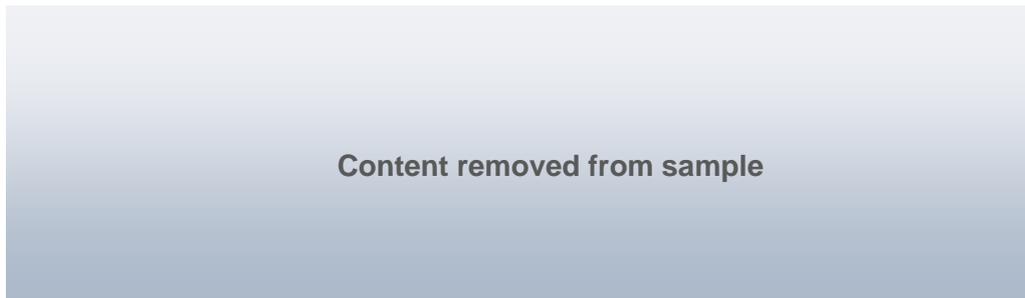
- Processed Fruit and Vegetables
- Shelf Stable Fruit and Vegetables
- Shelf Stable Beans
- Shelf Stable Fruit
- Shelf Stable Tomatoes
- Shelf Stable Vegetables
- Frozen Processed Fruit and Vegetables
- Frozen Fruit
- Frozen Processed Potatoes
- Frozen Processed Vegetables

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

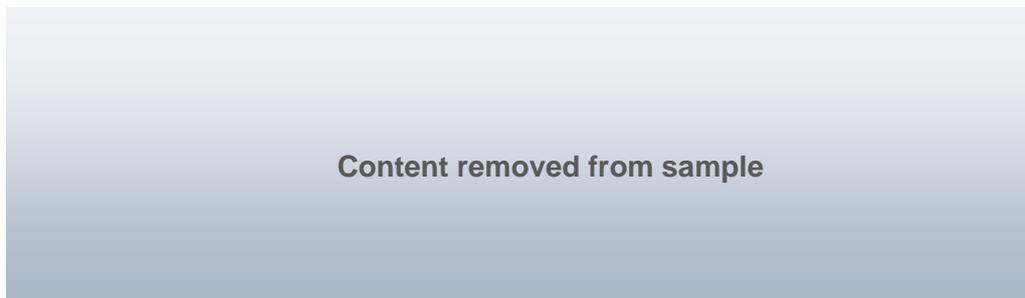
PROCESSED MEAT, SEAFOOD AND ALTERNATIVES TO MEAT IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

KEY DATA FINDINGS

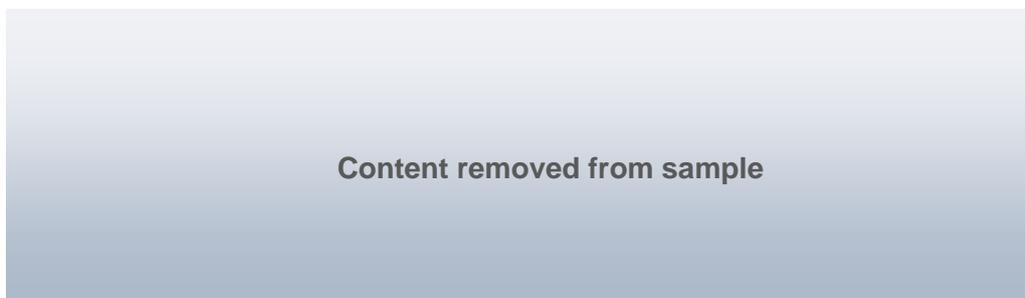


2021 DEVELOPMENTS

Retail sales face reverse dynamics in 2021

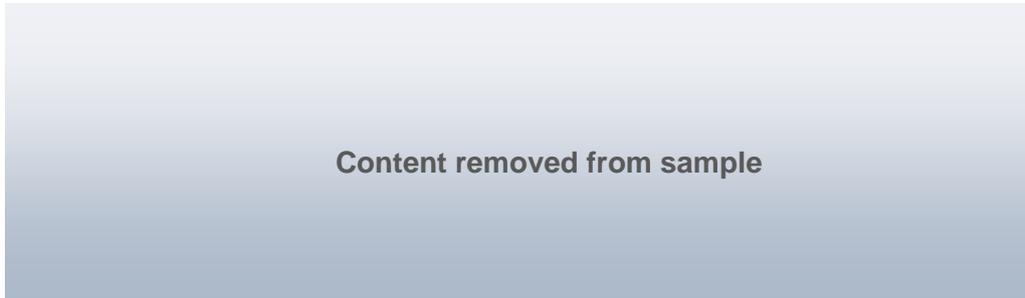


Foodservice dynamics impact volume growth across the category

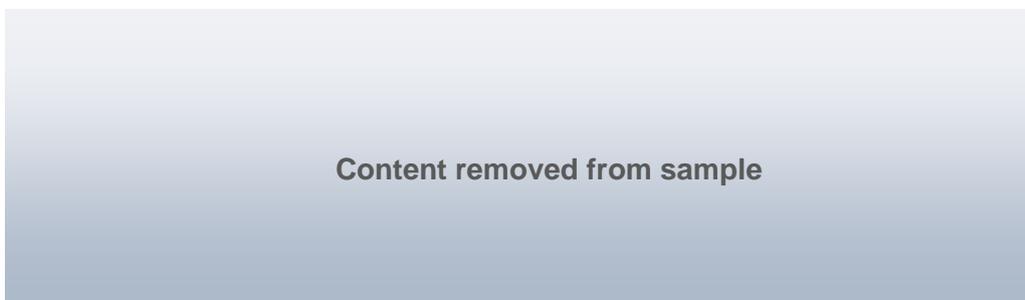


PROSPECTS AND OPPORTUNITIES

Investment in cooking appliances fosters growth



Regained mobility supports innovation within the category



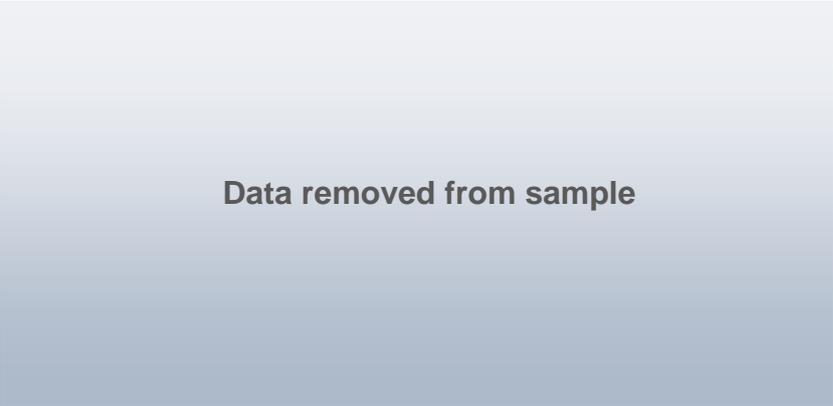
CATEGORY DATA

Table 47 Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2016-2021

'000 tonnes

	2016	2017	2018	2019	2020	2021
Processed Meat, Seafood and Alternatives to Meat	Data removed from sample					
Processed Meat						
- Shelf Stable Meat						
-- Shelf Stable Processed Red Meat						
-- Shelf Stable Processed Poultry						
- Chilled Processed Meat						
-- Chilled Processed Red Meat						
-- Chilled Processed Poultry						
- Frozen Processed Meat						
-- Frozen Processed Red Meat						
-- Frozen Processed Poultry						

- Processed Seafood
- Shelf Stable Seafood
- Chilled Processed Seafood
- Frozen Processed Seafood
- Meat and Seafood Substitutes
- Chilled Meat and Seafood Substitutes
- Frozen Meat and Seafood Substitutes
- Shelf Stable Meat and Seafood Substitutes



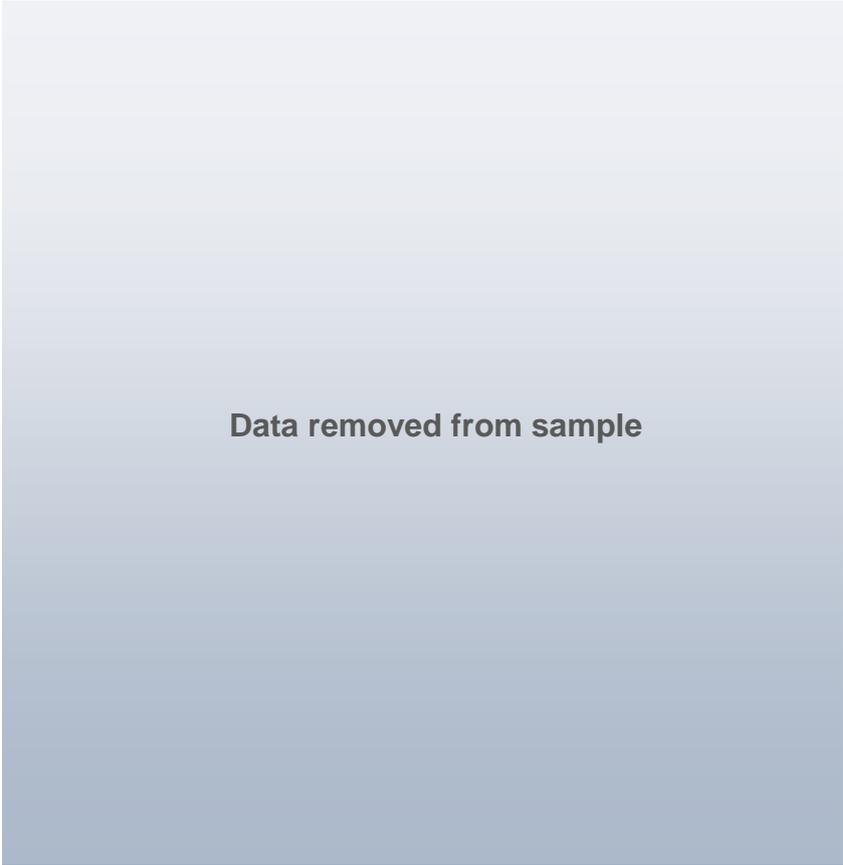
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 48 Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2016-2021

AED million

2016 2017 2018 2019 2020 2021

- Processed Meat, Seafood and Alternatives to Meat
- Processed Meat
- Shelf Stable
- Shelf Stable Processed Red Meat
- Shelf Stable Processed Poultry
- Chilled Processed Meat
- Chilled Processed Red Meat
- Chilled Processed Poultry
- Frozen Processed Meat
- Frozen Processed Red Meat
- Frozen Processed Poultry
- Processed Seafood
- Shelf Stable Seafood
- Chilled Processed Seafood
- Frozen Processed Seafood
- Meat and Seafood Substitutes
- Chilled Meat and Seafood Substitutes
- Frozen Meat and Seafood Substitutes
- Shelf Stable Meat and Seafood Substitutes



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 49 Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Processed Meat, Seafood and Alternatives to Meat	Data removed from sample		
Processed Meat			
- Shelf Stable Meat			
-- Shelf Stable Processed Red Meat			
-- Shelf Stable Processed Poultry			
- Chilled Processed Meat			
-- Chilled Processed Red Meat			
-- Chilled Processed Poultry			
- Frozen Processed Meat			
-- Frozen Processed Red Meat			
-- Frozen Processed Poultry			
Processed Seafood			
- Shelf Stable Seafood			
- Chilled Processed Seafood			
- Frozen Processed Seafood			
Meat and Seafood Substitutes			
- Chilled Meat and Seafood Substitutes			
- Frozen Meat and Seafood Substitutes			
- Shelf Stable Meat and Seafood Substitutes			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 50 Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Processed Meat, Seafood and Alternatives to Meat	Data removed from sample		
Processed Meat			
- Shelf Stable Meat			
-- Shelf Stable Processed Red Meat			
-- Shelf Stable Processed Poultry			
- Chilled Processed Meat			
-- Chilled Processed Red Meat			
-- Chilled Processed Poultry			
- Frozen Processed Meat			
-- Frozen Processed Red Meat			
-- Frozen Processed Poultry			
Processed Seafood			
- Shelf Stable Seafood			
- Chilled Processed Seafood			
- Frozen Processed Seafood			
Meat and Seafood Substitutes			
- Chilled Meat and Seafood Substitutes			
- Frozen Meat and Seafood Substitutes			
- Shelf Stable Meat and Seafood Substitutes			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 51 Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2016-2021

% retail volume	2016	2017	2018	2019	2020	2021
Beef	Data removed from sample					
Pork						
Other Red Meats						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 52 Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2016-2021

% retail volume	2016	2017	2018	2019	2020	2021
Beef	Data removed from sample					
Pork						
Other Red Meats						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

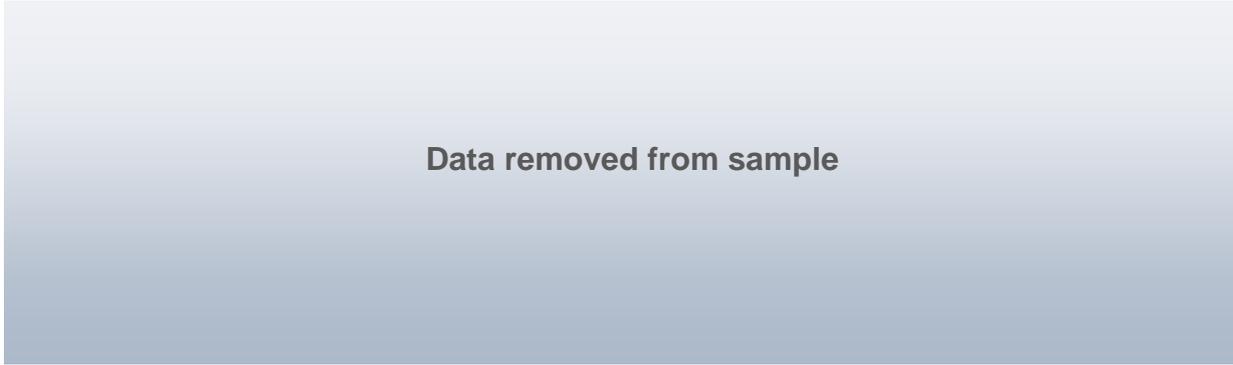
Table 53 Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2016-2021

% retail volume	2016	2017	2018	2019	2020	2021
Beef	Data removed from sample					
Lamb						
Pork						
Other Red Meats						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 54 Sales of Frozen Processed Poultry by Type: % Value Breakdown 2016-2021

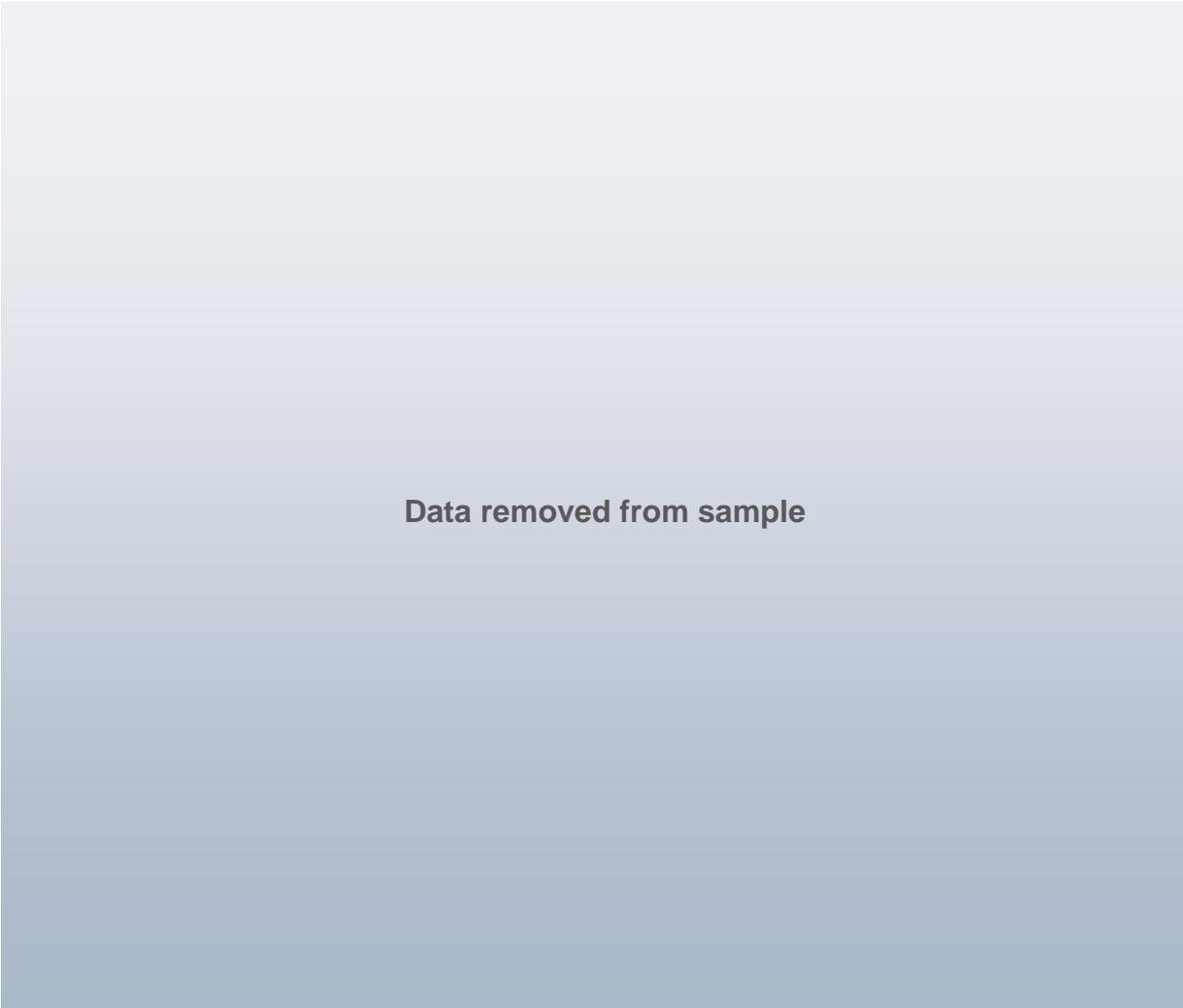
% retail value rsp	2016	2017	2018	2019	2020	2021
Chicken Burgers	Data removed from sample					
Chicken Nuggets						
Chicken Sausages						
Coated Chicken						
Shish Kebab						
Others						

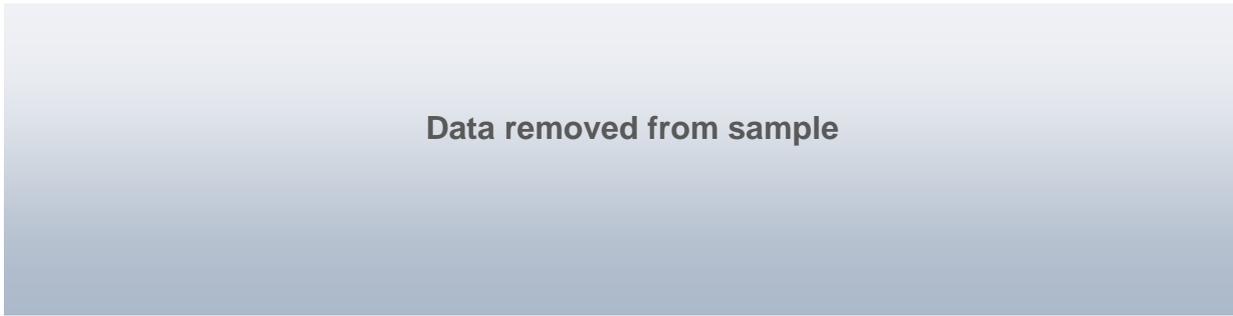


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 57 LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 58 Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other Foods Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 59 Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2021-2026

'000 tonnes	2021	2022	2023	2024	2025	2026
Processed Meat, Seafood and Alternatives to Meat	Data removed from sample					
Processed Meat						
- Shelf Stable Meat						
-- Shelf Stable Processed Red Meat						
-- Shelf Stable Processed Poultry						
- Chilled Processed Meat						
-- Chilled Processed Red Meat						
-- Chilled Processed Poultry						
- Frozen Processed Meat						
-- Frozen Processed Red Meat						
-- Frozen Processed Poultry						
Processed Seafood						
- Shelf Stable Seafood						
- Chilled Processed Seafood						
- Frozen Processed Seafood						
Meat and Seafood Substitutes						
- Chilled Meat and Seafood Substitutes						
- Frozen Meat and Seafood Substitutes						
- Shelf Stable Meat and Seafood Substitutes						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 60 Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2021-2026

AED million	2021	2022	2023	2024	2025	2026
Processed Meat, Seafood and Alternatives to Meat	Data removed from sample					
Processed Meat						
- Shelf Stable Meat						
-- Shelf Stable Processed Red Meat						
-- Shelf Stable Processed Poultry						
- Chilled Processed Meat						
-- Chilled Processed Red Meat						
-- Chilled Processed Poultry						
- Frozen Processed Meat						
-- Frozen Processed Red						

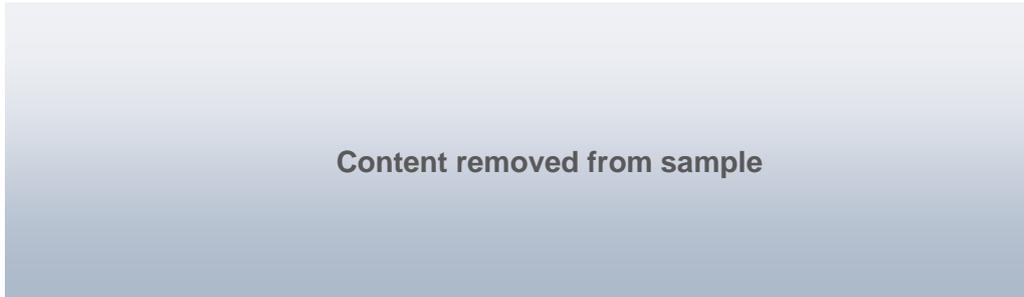
- Meat
- Frozen Processed Poultry
- Processed Seafood
- Shelf Stable Seafood
- Chilled Processed Seafood
- Frozen Processed Seafood
- Meat and Seafood Substitutes
- Chilled Meat and Seafood Substitutes
- Frozen Meat and Seafood Substitutes
- Shelf Stable Meat and Seafood Substitutes



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

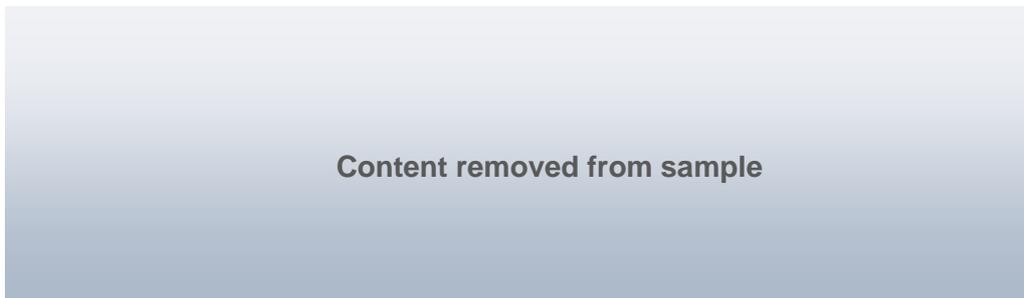
RICE, PASTA AND NOODLES IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

KEY DATA FINDINGS

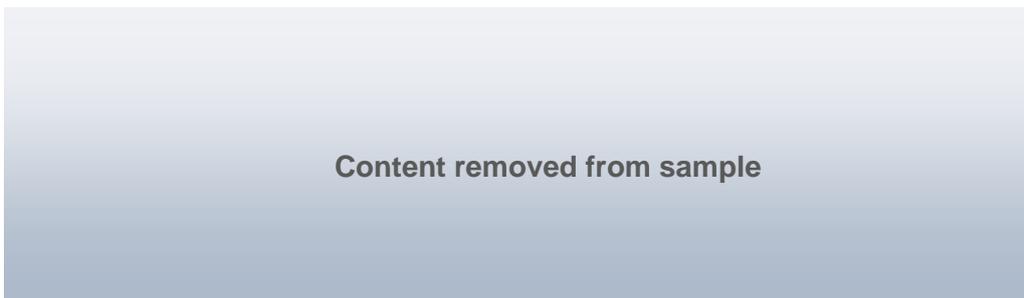


2021 DEVELOPMENTS

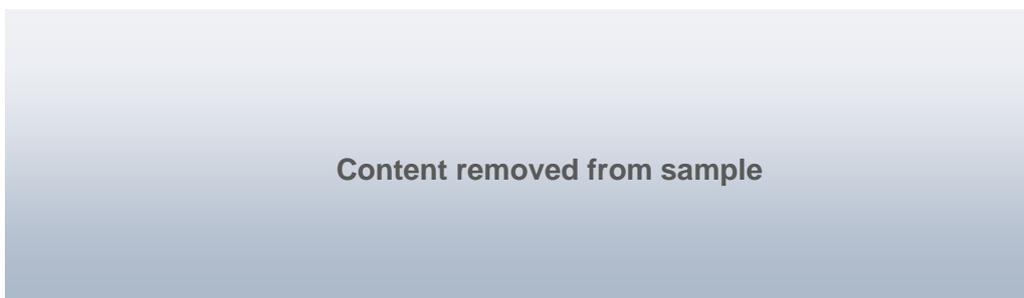
Foodservice dynamics dictate the performance of the category in 2021

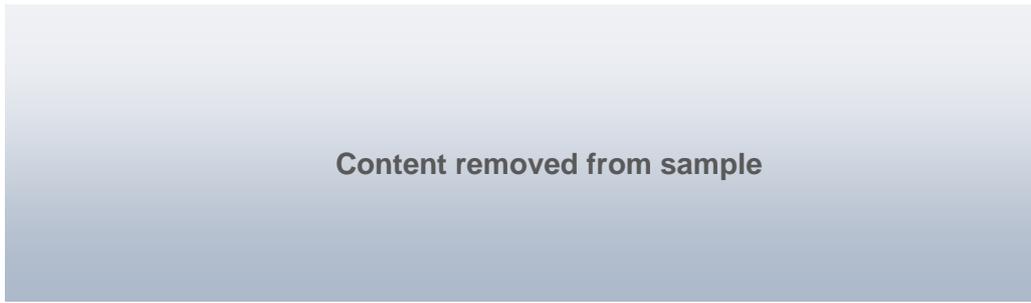


Convenient options lose momentum in 2021



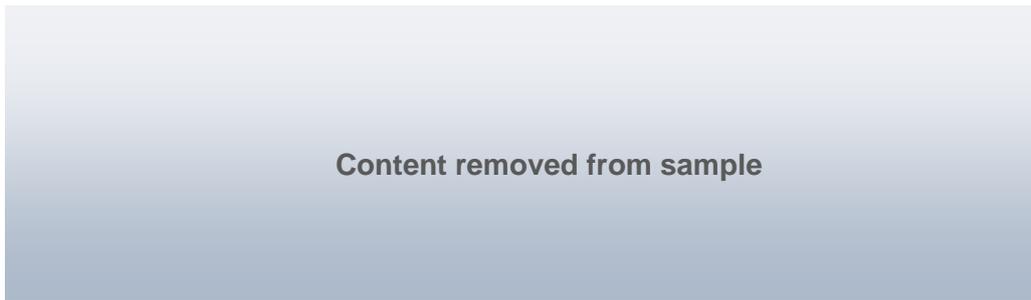
Review of priorities dictates growth of channels



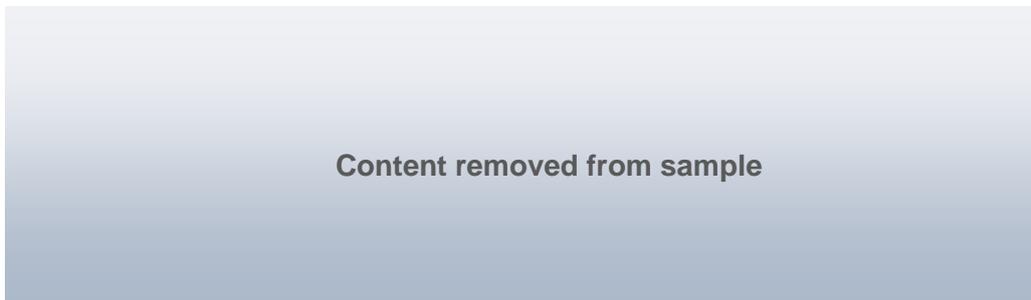


PROSPECTS AND OPPORTUNITIES

Novelty maintains the attractiveness of premium products



Further exploration of functionality likely to drive up value



Convenience and diversity fuel further potential for e-commerce



CATEGORY DATA

Table 61 Sales of Rice, Pasta and Noodles by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Rice, Pasta and Noodles	Data removed from sample					
Noodles						
- Chilled Noodles						
- Frozen Noodles						
- Instant Noodles						
-- Instant Noodle Cups						
-- Instant Noodle Pouches						
- Plain Noodles						
Pasta						
- Chilled Pasta						
- Dried Pasta						
Rice						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 62 Sales of Rice, Pasta and Noodles by Category: Value 2016-2021

AED million	2016	2017	2018	2019	2020	2021
Rice, Pasta and Noodles	Data removed from sample					
Noodles						
- Chilled Noodles						
- Frozen Noodles						
- Instant Noodles						
-- Instant Noodle Cups						
-- Instant Noodle Pouches						
- Plain Noodles						
Pasta						
- Chilled Pasta						
- Dried Pasta						
Rice						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 63 Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Rice, Pasta and Noodles	Data removed from sample		
Noodles			
- Chilled Noodles			
- Frozen Noodles			
- Instant Noodles			
-- Instant Noodle Cups			
-- Instant Noodle Pouches			
- Plain Noodles			
Pasta			

- Chilled Pasta
- Dried Pasta
- Rice

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 64 Sales of Rice, Pasta and Noodles by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Rice, Pasta and Noodles	Data removed from sample		
Noodles			
- Chilled Noodles			
- Frozen Noodles			
- Instant Noodles			
-- Instant Noodle Cups			
-- Instant Noodle Pouches			
- Plain Noodles			
Pasta			
- Chilled Pasta			
- Dried Pasta			
Rice			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 65 Sales of Instant Noodles by Leading Flavours: Rankings 2016-2021

ranking

	2016	2017	2018	2019	2020	2021
Chicken	Data removed from sample					
Fried Noodles						
Special Chicken						
Vegetable						
Chicken & Onion						
Shrimp						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 66 NBO Company Shares of Rice, Pasta and Noodles: % Value 2017-2021

% retail value rsp

Company	2017	2018	2019	2020	2021
Data removed from sample					

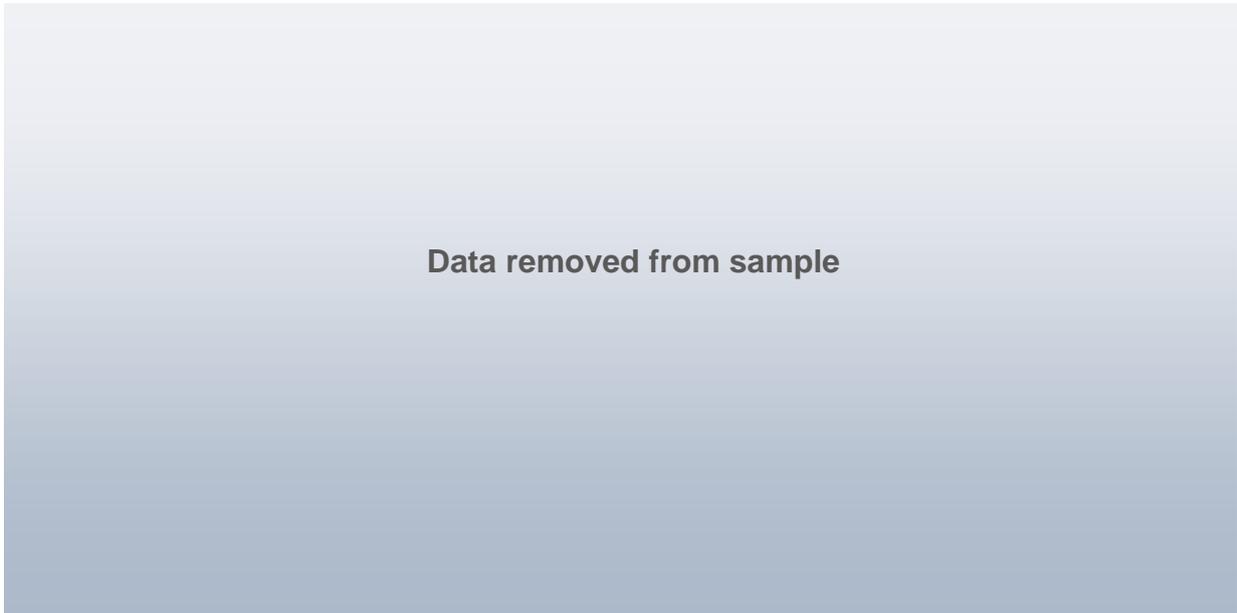


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 67 LBN Brand Shares of Rice, Pasta and Noodles: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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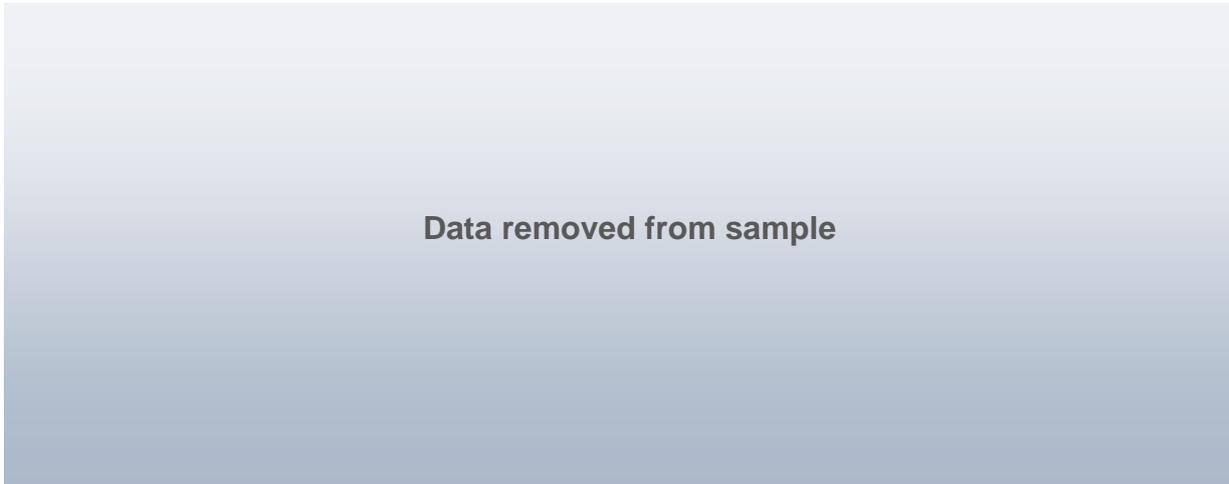




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 68 NBO Company Shares of Rice: % Value 2017-2021

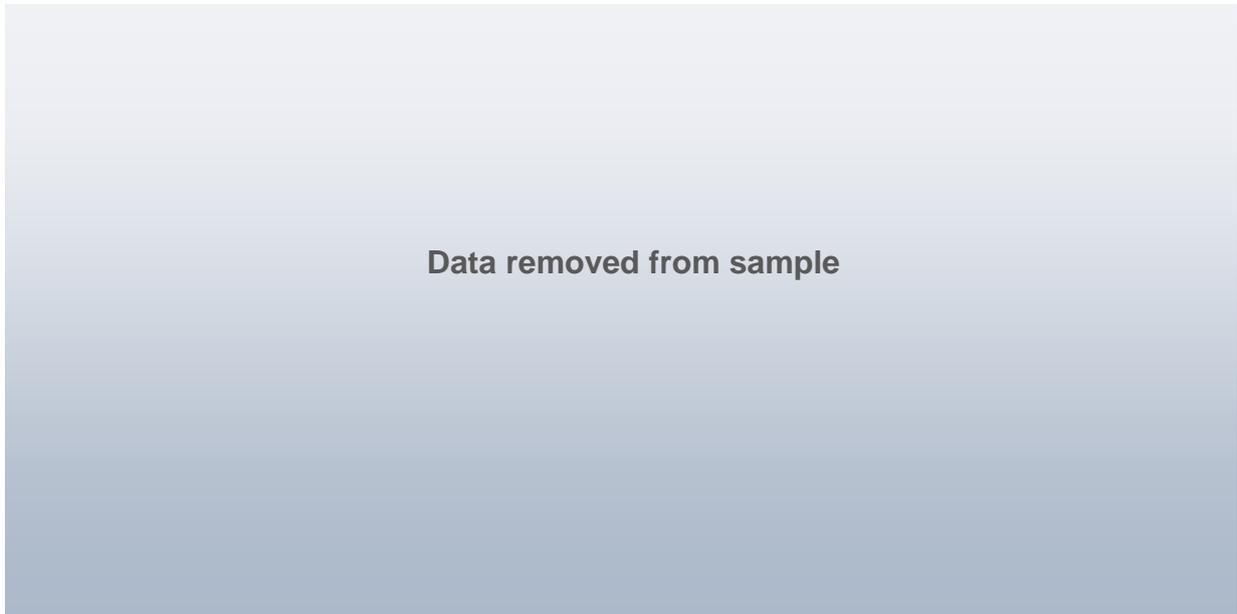
% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 69 LBN Brand Shares of Rice: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 70 NBO Company Shares of Pasta: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 71 LBN Brand Shares of Pasta: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 72 NBO Company Shares of Noodles: % Value 2017-2021

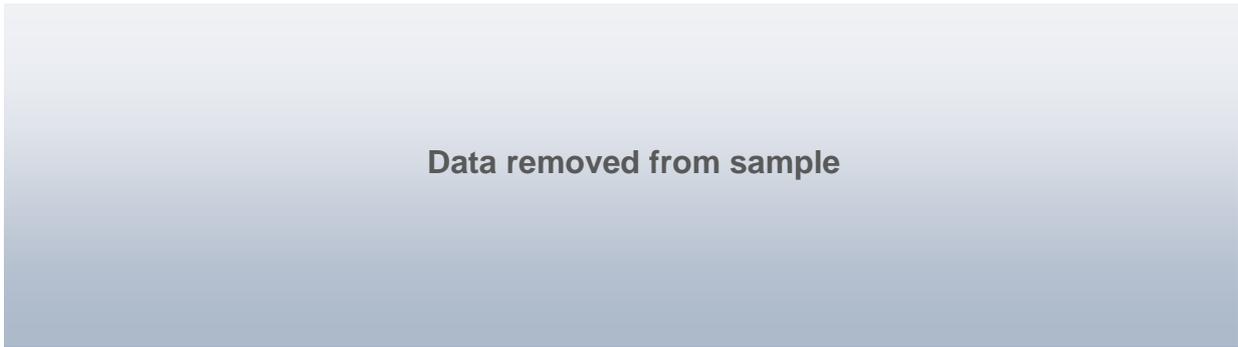
% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 73 LBN Brand Shares of Noodles: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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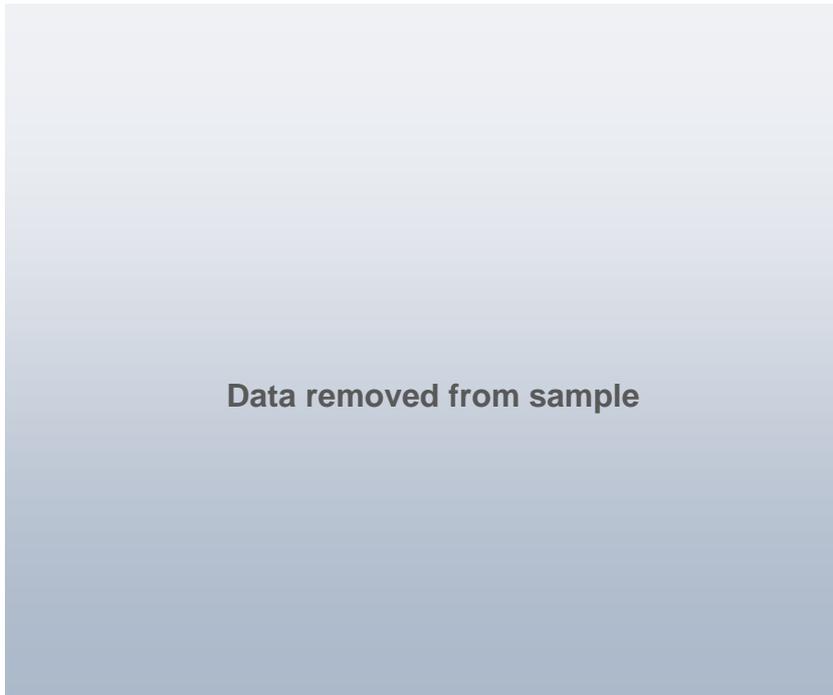


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 74 Distribution of Rice, Pasta and Noodles by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
--------------------	------	------	------	------	------	------

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Food/drink/tobacco specialists
- Independent Small Grocers
- Other Grocery Retailers
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Other Foods Non-Grocery Specialists
- Mixed Retailers
- Non-Store Retailing



- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 75 Distribution of Rice by Format: % Value 2016-2021

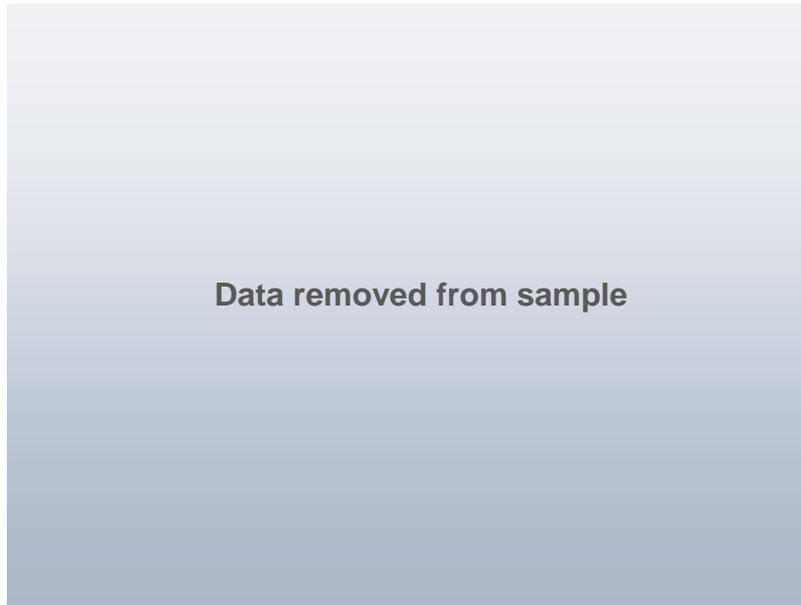
% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other Foods Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 76 Distribution of Pasta by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						

- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Food/drink/tobacco specialists
- Independent Small Grocers
- Other Grocery Retailers
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Other Foods Non-Grocery Specialists
- Mixed Retailers
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total

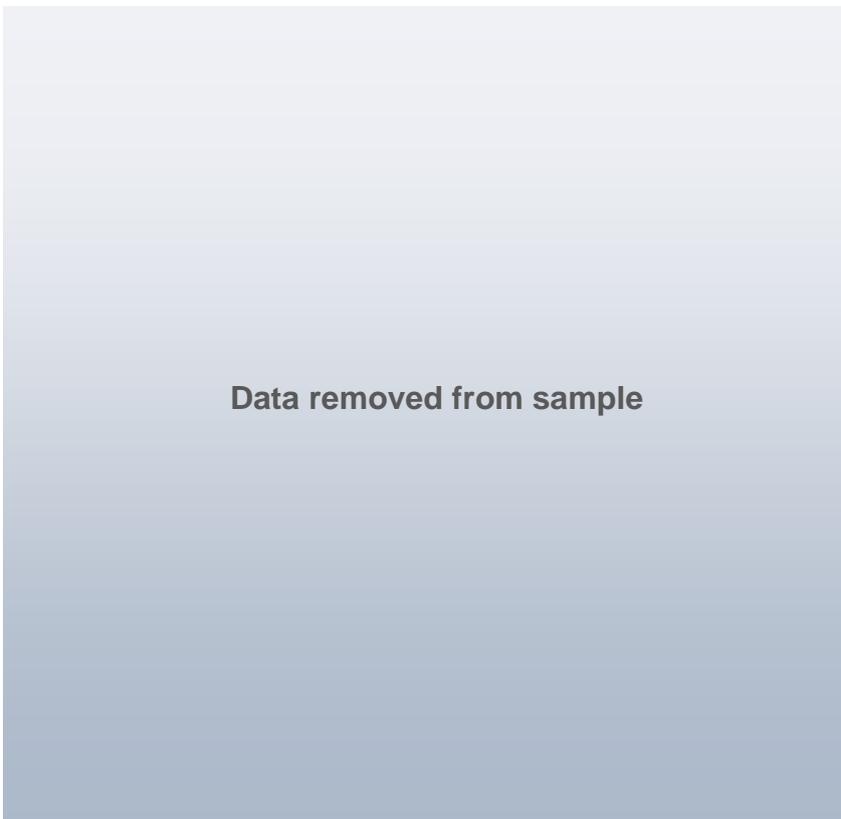


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 77 Distribution of Noodles by Format: % Value 2016-2021

% retail value rsp

	2016	2017	2018	2019	2020	2021
Store-Based Retailing						
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other Foods Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 78 Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2021-2026

'000 tonnes	2021	2022	2023	2024	2025	2026
Rice, Pasta and Noodles	Data removed from sample					
Noodles						
- Chilled Noodles						
- Frozen Noodles						
- Instant Noodles						
-- Instant Noodle Cups						
-- Instant Noodle Pouches						
- Plain Noodles						
Pasta						
- Chilled Pasta						
- Dried Pasta						
Rice						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 79 Forecast Sales of Rice, Pasta and Noodles by Category: Value 2021-2026

AED million	2021	2022	2023	2024	2025	2026
Rice, Pasta and Noodles	Data removed from sample					
Noodles						
- Chilled Noodles						
- Frozen Noodles						
- Instant Noodles						
-- Instant Noodle Cups						
-- Instant Noodle Pouches						
- Plain Noodles						
Pasta						
- Chilled Pasta						
- Dried Pasta						
Rice						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 80 Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2021-2026

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Rice, Pasta and Noodles	Data removed from sample		
Noodles			
- Chilled Noodles			
- Frozen Noodles			
- Instant Noodles			
-- Instant Noodle Cups			
-- Instant Noodle Pouches			

- Plain Noodles
- Pasta
- Chilled Pasta
- Dried Pasta
- Rice

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 81 Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2021-2026

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Rice, Pasta and Noodles	Data removed from sample		
Noodles			
- Chilled Noodles			
- Frozen Noodles			
- Instant Noodles			
-- Instant Noodle Cups			
-- Instant Noodle Pouches			
- Plain Noodles			
Pasta			
- Chilled Pasta			
- Dried Pasta			
Rice			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources