

Middle East & Africa Frozen Food Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 130 pages | Mordor Intelligence

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Report description:

The Middle East & Africa Frozen Food market is projected to register a CAGR of 6.2% during the forecast period, 2022-2027.

Rapid urbanization, lack of time to cook, increasing demand for convenient food, improved living standards, and the presence of a high percentage of expatriates are driving the demand for frozen food in the region. Millennials and the Gen Z population are more inclined toward frozen foods owing to their willingness of trying new varieties of convenience food such as frozen snacks and frozen ready meals.

The attributes of frozen foods such as easier storage, preserved nutrition at peak ripeness, extended shelf life, and reduction in food waste are boosting the growth of frozen food sales in the region. Additionally, the increasing number of modern retail formats in the country and the availability of a greater variety of frozen ready-to-eat meals have attracted urban consumers who are seeking packaged food products due to their fast-paced lifestyle, thereby leading to a noticeable increase in demand.

During the COVID-19 pandemic, the demand for non-perishable food products such as frozen food witnessed a huge surge in consumer demand, mainly due to the stockpiling nature of the consumers, caused by extended lockdowns.

MEA Frozen Food Market Trends

Increasing Demand for Convenience Food

A surge in the number of employed population across the region has resulted in the growing demand for convenient food formats which is driving the demand for frozen food. According to International Labour Organization Qatar has the highest working

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population with 87% of labor force participation in 2021. The working population is inclined toward convenient food including precooked and frozen meals such as vegetable meals, meatballs, ready-to-eat, ready-to-cook, and other frozen food products due to hectic work schedules. Moreover, consumers are opting for frozen foods to prevent the frequent buying of perishable foods which should be used within a shorter period, unlike frozen food with a longer shelf life. Furthermore, with sweet indulgence, frozen desserts, such as ice creams, are highly appreciated among consumers in the country. Thus, global manufacturers are adopting various strategies to meet consumers' demands. For instance, Mars acquired its Dubai subsidiary, following the new UAE law on foreign ownership. It previously owned 49% of the shares in Dubai LLC. This acquisition strengthened its presence and development in the Middle East, including the United Arab Emirates.?

Saudi Arabia Holds Largest Share in the Market

With the increasing number of double-income families in Saudi Arabia, there is a growing demand for quick and easy-cook meal solutions. The primary driver of the frozen food market in the future will be the growing consumer inclination towards frozen desserts, ready-to-eat meals, and frozen meat products. For instance, according to the consumer behavior study conducted by Siwar Foods, a Saudi-based FMCG company, 80% of consumers in the country are open to purchasing frozen food, with taste, variety, quality, and affordability as the most important drivers of choice. Like other gulf nations, Saudi Arabia is heavily dependent on imports to meet local demand as a result of poor rates of self-sufficiency in terms of food production. Due to their high retail stability and ease of importation, frozen food products are more common in the nation than in other food formats. Moreover, aided by the high population of Saudi Arabia than other regional countries, the consumption volume of food is much higher. The main exporters of processed meat to Saudi Arabia are European countries, such as France and the Netherlands.

MEA Frozen Food Market Competitor Analysis

The Middle East & Africa Frozen Food Market is fragmented and highly competitive with many regional and international players in the region. The key players in the region include Sunbulah Group, General Mills Inc., and Al Kabeer Group among others. The major companies in the region are investing in research and development to innovate their product offerings such as halal-certified and organic frozen food. The majority of the foreign brands partner with regional companies for the distribution of their frozen food offerings across the Middle East. For instance, South Africa's RFG Holdings has acquired frozen-food assets from local peer Pioneer Foods for an undisclosed sum.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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