

Bahrain Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Bahrain Foodservice Market size is estimated at 0.95 billion USD in 2024, and is expected to reach 1.64 billion USD by 2029, growing at a CAGR of 11.55% during the forecast period (2024-2029).

Demand for fast food and high internet penetration leading to rise in food delivery

- Quick service restaurants comprised the largest segment of Bahrain's foodservice market in 2022. The segment is expected to register a CAGR of 11.17% during the study period, owing to the continuous increase in the preference for fast food and increasing eating-out habits post-pandemic. As people become more health-conscious, fast food chains in Bahrain are offering more options that cater to those looking for healthier alternatives. Some of the offerings include salads, grilled chicken sandwiches, and veggie burgers. Fast food chains in Bahrain are also incorporating local flavors into their menus, aiding the segment's growth. For instance, McDonald's in Bahrain offers a McArabia sandwich, which includes Middle Eastern spices and ingredients.

- The FSR segment holds the second-largest market share; it is expected to register a CAGR of 8.51% by value during the forecast period. This is primarily attributed to the increasing demand for Middle Eastern and Asian cuisines in the country, which accounted for 34.45% and 31.61% market shares, respectively, in 2022. Asian cuisine has evolved by incorporating new flavors and new trends. The most popular Asian cuisines in the country are Chinese, Japanese, Thai, and Indian. Some of the traditional dishes that are commonly found in Bahrain include Nasi Goreng, pad Thai, sushi, biryani, and Korean BBQ.

- The cloud-kitchen segment is the fastest growing; it is anticipated to register a CAGR of 30.64% by value during the forecast period. The growth would be aided by the increased internet penetration rate in the country and online food deliveries. As of January 2022, there were around 1.75 million internet users in Bahrain, and internet penetration stood at 99% of the total population in 2022.

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Bahrain Foodservice Market Trends

Quick service restaurants dominate Bahrain's foodservice industry, with popular brands like Burger King, Five Guys, and McDonald's

- Foodservice outlets in Bahrain are dominated by quick-service restaurants, followed by full-service restaurants and cafe & bar outlets. QSR outlets in the country are projected to record a CAGR of 5.44% during the forecast period. This is attributed to the growing fast-food industry, with a wide range of local and international chains operating in the country. The increased popularity of quick-service restaurants is due to young people's propensity to eat fast food frequently. In Bahrain, there are more than a hundred American franchise eateries and outlets, and more are constantly opening. Bahrain is home to a number of well-known brands, including Five Guys, Texas Roadhouse, Baskin Robbins, Burger King, Caribou Coffee, Chili's, Cold Stone Creamery, Fuddruckers, the Great American Bagel Co., Hardee's, IHOP, KFC, Starbucks, Krispy Kreme, Little Caesar's, and McDonald's, among others.

- Cloud kitchen outlets are projected to record a value CAGR of 4.91% in the forecast period. This is due to the increased penetration of the internet and the growing demand for online food delivery services. Additionally, the market is expanding because of the greater integration of point-of-sale (POS), kitchen display systems (KDS), and inventory management technology. These systems help to speed up various kitchen tasks, enhance communication, and prevent order-taking delays. In the cafes & bars segment, around 86.48% of the outlets were cafes and juice and smoothie bars in 2022, with cafes representing 67.21% of the outlets as well. The cafe outlets are increasing owing to the demand for take-out caused by the pandemic. Some popular chained cafe outlets in Bahrain include Starbucks, Costa Coffee, and Caribou Coffee, with 43, 8, and 15 outlets, respectively.

Average order value in Bahrain's full service restaurants was highest in 2022, at USD 29.7, driven by popular dishes like jareesh, harees, machboos Laham, mandi Laham, and margoog

- In Bahrain, the average order was observed to be the highest among the FSR segment in 2022 compared to other food service types, with a price of USD 29.7, which is around 54% higher than the quick service restaurants. Full service restaurants in the country have been making necessary changes to their menu offerings to attract more consumers by offering more expensive dishes with premium ingredients, which led to higher average order values. Some of the popular full service dishes, like Jareesh, in Bahrain are priced at around USD 6.5 per 300 grams. Harees price is around USD 5.2 per 300 grams, Machboos Laham around USD 7.4 per 300 grams, Mandi Laham at 7.4 USD per 300 grams, and Margoog around USD 6.4 per 300 grams.

- The average orders through cafes & bars in Bahrain increased by around 11.24% between 2019 to 2022. This is attributed to increased coffee consumption. In Bahrain, the cafe culture has increased as people prefer drinking coffee in cafes which is intrinsically linked to the demand for specialty coffee wave in the region. Thus, it drives the growth of the coffee market in the country. More upmarket and expensive menu items have also been increasingly offered in cafes, such as specialty coffee drinks, artisanal pastries, and gourmet sandwiches, which have increased the average order value in cafes. The average order value for the cloud kitchen was priced at 13.4 in 2022. The expansion of the cloud kitchen market is being driven by an increase in demand for online meal delivery. Popular dishes offered by cloud kitchens in Bahrain are Harees, Kebabs, Hummus, and Fatayer, priced at

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USD 5.2, USD 2.8, USD 5.8, and USD 1.7, respectively, per 300 gms in 2022.

Bahrain Foodservice Industry Overview

The Bahrain Foodservice Market is fragmented, with the top five companies occupying 12.67%. The major players in this market are Fakhro Restaurants Company WLL, Gastronomica General Trading Company WLL, Jawad Business Group, LuLu Group International and SSP Group PLC (sorted alphabetically).

Additional Benefits:

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

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