

Middle East Dairy - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Middle East Dairy Market size is estimated at USD 18.89 billion in 2024, and is expected to reach USD 23.43 billion by 2029, growing at a CAGR of 4.40% during the forecast period (2024-2029).

Widespread adoption of distribution channels, led by remarkable sales through supermarkets and hypermarkets is propelling the growth

- In 2022, the distribution channel in the Middle East witnessed a growth of 2.69% compared to 2021. Off-trade retailing dominated Middle East's retail space during the review period (2017-2022). In 2022, off-trade retailing held a share of 81.26%. In the Middle East, consumers are highly fascinated by off-trade retailing due to the greater convenience they get when purchasing dairy products.
- On-trade retailing held a share of 18.73% in the Middle East in 2022. In on-trade channels (quick-service restaurants), the prices are fixed for dairy products, while consumers are given several options in off-trade channels. In the Middle East, off-trade channels offer dairy products at varied prices (low, medium, and high). The milk sold by these retailing units is available from USD 2.78 to as high as USD 35.4. The availability of milk at varied prices also promotes the buying power among consumers as they can purchase the products that suit their affordability parameters.
- In the Middle East, off-trade retailers focus on providing various dairy products, including different flavors such as unsweetened, chocolate, and vanilla. To increase the consumer base, they offer consumers complete information about the products, such as product specifics (ingredient used, seed used, and others). As a result, consumers are engaged in purchasing their milk beverages through off-trade modes.
- During the forecast period, the demand for dairy products is expected to increase due to the rising health consciousness among

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the population. As a result, the dependency on retailing units is expected to grow during 2025-2026, as they offer consumers higher visibility about the product.

Saudi Arabia plays a major role in the consumption of dairy products in the region

- Saudi Arabia and Iran are identified as the major markets in the region. These two countries collectively accounted for a 52.2% share in the overall dairy products volume sales across the region in 2022. The key driving factors are the high production of raw milk, rising consumer preference for quality dairy products, and adequate industry regulation to facilitate the manufacturing and trading of dairy products.
- Saudi Arabia is the largest dairy producer in the GCC countries, supported by the highest consumption of dairy products in the country. In 2022, the consumption of dairy products in Saudi Arabia reached around USD 5,479 million, representing a 2.9% growth compared to the previous year, 2021.
- Iran's dairy industry has a nominal production capacity of 12 million metric tons per annum. Around 650 licensed dairy production units are active across the country. Also, dairy exports rose by 14% in 2021, from 1.22 million tonnes to 1.39 million tonnes in 2022.
- The United Arab Emirates is identified as the fastest-growing dairy market in the Middle East. The UAE market is anticipated to grow by 13.4% in 2025 from 2022. Milk is the leading category in the UAE market, accounting for 26.8% of the market value in 2022. Consumers in the country spend a major portion of their income on milk as they consider it a pro-health beverage.
- In the Middle East, the Israeli dairy industry is considered one of the most advanced. As of 2021, approximately 125,000 cattle made up the Israeli dairy herd. In the Israeli dairy industry, a cow produced 12,000 kg of milk annually on average in 2021.

Middle East Dairy Market Trends

Increasing government-run health and wellness campaigns driving dairy product consumption in the region

- Consumers in the Middle East are developing a sense of healthy living and opting for food with functional attributes, including probiotic yogurt and sour milk drinks like laban and buttermilk. Consumer demand for convenient and healthy on-the-go snack options is the primary driver for the increasing consumption of dairy snack products across the region.
- Within the Middle East, Saudi Arabia dominates the overall dairy market with the highest consumption. The increasing government-run health and wellness campaigns designed to combat obesity and related problems (diabetes, high blood pressure, heart disease, and high cholesterol) are encouraging consumers to purchase healthier products, thus directly fueling the dairy market in the country. The Saudi government has been ramping up efforts to increase local production by encouraging manufacturers and producers with incentives and subsidies.
- The United Arab Emirates is another prominent market for dairy products. Increasing demand for flavored and organic dairy products due to the growing ex-pat population and changing consumption patterns are driving the consumption of dairy products in the country.
- Other countries like Kuwait, Oman, Bahrain, Qatar, Iran, and Iraq also contribute significantly to the market's growth. These countries are focusing on reducing their dependency on imports, and governments are taking various steps to support and promote local production. Thus, the consumption of dairy products in these countries is expected to increase at a higher rate during the forecast period.

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Middle East Dairy Industry Overview

The Middle East Dairy Market is fragmented, with the top five companies occupying 19.63%. The major players in this market are Almarai Company, Arla Foods Amba, Danone SA, Saudia Dairy and Foodstuff Company (SADAFCO) and The National Agricultural Development Company (NADEC) (sorted alphabetically).

Additional Benefits:

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

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