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

Market Report | 2024-02-17 | 222 pages | Mordor Intelligence

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Report description:

The Middle East Dairy Alternatives Market size is estimated at USD 346.96 million in 2024, and is expected to reach USD 615.23 million by 2029, growing at a CAGR of 12.14% during the forecast period (2024-2029).

Strong presence of supermarkets and convenience stores is boosting the dairy products sales

- In 2022, the distribution channel in the Middle East witnessed a growth of 2.69% compared to 2021. Off-trade retailing dominated the Middle Eastern 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 fascinated by off-trade retailing due to the greater convenience they get when purchasing dairy-free products.
- In on-trade channels (quick-service restaurants), the prices are fixed for non-dairy products, while consumers are given several options in off-trade channels. In the Middle East, off-trade channels offer non-dairy products at varied prices (low, medium, and high). Oat milk sold by these retailing units was available from USD 2.78 to USD 35.4 in 2022. 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 plant-based 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 purchase milk beverages through off-trade modes.
- During the forecast period, the demand for non-dairy products is expected to increase due to the rising health consciousness among the population. As a result, the dependency on retailing units is expected to observe growth during 2025-2026 by 6.25%

due to higher visibility of the product to consumers.

Growing demand for plant-based products is fueling the market growth

- The rise in the vegan population concerning the rising importance of plant-based nutrition drives the demand for dairy alternatives in the region. Saudi Arabia, United Arab Emirates, and Iran exhibit significant dairy alternative consumption compared to other Middle Eastern countries. In 2022, three countries collectively held a 46.28% share of the overall dairy alternative consumption in the region.
- Saudi Arabia is the leading market for dairy alternatives in the region. Non-dairy butter and plant-based milk are majorly consumed dairy alternative products in the country. In 2022, both combinedly accounted for more than 90% of the value share. The growing lactose-intolerant population and increasing cow's milk allergy in the country have been significant factors driving the dairy alternatives market. As of 2021, 61.96% of the Saudi Arabian population had a milk allergy.
- The United Arab Emirates is the second leading market for dairy alternatives in the region. The sales value of dairy alternatives in the United Arab Emirates is anticipated to grow by USD 61.8 million in 2025, up from USD 46.8 million in 2022. The Increasing vegan population is one of the major factors for the growth of dairy alternatives in the United Arab Emirates. As of 2021, more than 8% of the United Arab Emirates population was vegan.
- High consumer awareness about plant-based nutrition and favorable macroeconomic environments are the key factors shaping the Irani dairy alternatives market. The sales of the dairy alternatives market in Iran experienced a growth rate of 20.3% from 2018 to 2022.

Middle East Dairy Alternatives Market Trends

The increase in consumption of dairy alternative products in the Middle East can be attributed to the growing vegan population, improved animal welfare awareness, and government initiatives

- The consumption of different types of dairy alternative products in the Middle East has been on the rise for the past few years due to the growing vegan population. For example, in 2022, more than 8% of the UAE population was vegan. There are even vegan exhibitions/trade shows and music festivals being conducted in different countries to promote vegan lifestyles. In addition, improved animal welfare and increasing government initiatives to strengthen this awareness are among the other key factors boosting the consumption of dairy alternatives.
- The growing prevalence of lactose intolerance is another reason consumers switch to dairy alternatives. For example, in Saudi Arabia, more than 30% of the population is facing lactose intolerance issues. One out of each three people in Saudi Arabia is knowledgeable regarding lactose intolerance disorder and its related factors and relieving factors.
- Consumers in the region are becoming increasingly aware of their nutritional choices, and owing to their busy lifestyles, their purchasing decision is dependent on the nutritional value of the product, which is driving the demand for plant-based milk in the region. Further, consumers, especially those who are allergic to milk, are keen to consume plant-based milk products. Among the different plant-based milk products, soy milk and almond milk held the majority of share across the region in 2022.
- The per capita consumption of non-dairy butter is expected to increase by 3.56% in 2023-2024. The key motivations for the consumers to adopt non-dairy butter are a concern for animals or sustainability followed by the change in dietary habits. However, other dairy alternative product categories like yogurt, cheese, and ice cream are still at a very nascent stage.

Middle East Dairy Alternatives Industry Overview

The Middle East Dairy Alternatives Market is fragmented, with the top five companies occupying 6.12%. The major players in this market are Campbell Soup Company, Danone SA, Ecomil, Green Spot Co. Ltd and Lam Soon Group (sorted alphabetically).

Additional Benefits:

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

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