

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

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Report description:

The Oman Foodservice Market size is estimated at USD 1.51 billion in 2024, and is expected to reach USD 2.16 billion by 2029, growing at a CAGR of 7.42% during the forecast period (2024-2029).

QSR remains the major channel owing to the rising popularity of international fast-food chains in the country

- The quick service restaurants segment accounted for the major market share in 2022, which is further forecasted to register a CAGR of 8.48% during the forecast period, 2023-2029. The consumption of fast food like kebabs, pizzas, burgers, and fried chicken products is increasing, and the demand for non-veg fast-food products is always high, as the poultry meat consumption of the country was around 34.27 kg per capita in 2022. The number of food chain outlets in Oman reached 41 outlets for Pizza Hut, 36 outlets for KFC, 24 outlets for McDonald's, and 10 outlets for Burger King across the country.

- The cloud kitchen sub-segment is projected to be the fastest-growing foodservice type, registering a CAGR of 17.45% during the forecast period, 2023-2029, owing to the increased number of online orders and the high internet penetration rate, which reached over 95.2% at the start of 2022. Popular ghost kitchens are expanding their footprint due to increased consumption and demand through online delivery as the setup cost is low and the reach is more compared to dine-in facilities like IO Kitchen, the first and leading Omani-owned cloud kitchen, which has signed a partnership agreement with KR&CO to use its smart kitchen operations. Oman-based cloud kitchen operator KitchenomiKs has raised USD 1.7 million in its seed round from angel investors.

- Post-pandemic, the overall foodservice market grew by 45.88% in terms of sales value in 2022 compared to 2020. Omani families spend 24% of their household budget on food, which is the highest percentage among the GCC countries. The number of international arrivals, which reached over 0.25 million in 2022, has also fueled the segment's growth.

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Oman Foodservice Market Trends

Oman's foodservice market grew by 42.7% in 2022, driven by the increased number of franchisee establishments and an immigrant working population

- The total number of outlets increased by 600 in 2017 compared to 6,074 in 2022. Owing to the increased number of franchisee establishments, the total number of small and medium enterprises (SMEs) in Oman increased by 42.7% to 73,741 by the end of March 2022 compared to 51,663 establishments during the same period in 2021. This created more job opportunities and increased the immigrant working population, which reached over 0.6 million as of 2022. However, of these enterprises, 15-20% were foodservice establishments. The consumption of food in the country increased to around 3.2 million metric tons in 2021 compared to 3.1 million tons in 2016. Owing to this, the number of orders per year also increased to more than 81,780 orders in 2022, observing an incline of 10.9% compared to 2017.

- The number of popular chained outlets also increased in Oman. For instance, in 2021, Pizza Hut was operating with 41 outlets, KFC with 36 outlets, MC Donald's with 24 outlets, and Burger King with 10 outlets. The quick service restaurants segment accounted for the major share in the market, as around 3000 outlets were of QSR type among all outlets in 2022, which is further projected to register a CAGR of 2.27% during the forecast period, 2023-2029. The cloud kitchen sub-segment is anticipated to register a CAGR of 6.21% during the forecast period, 2023-2029. Owing to the advancements in technology in the past decade, the growth in number of people ordering food online in Oman has seen an increase reaching around 2,000 orders per day from apps like Talabat and Delivery Hero. For instance, there were 4.92 million internet users as of January 2021, which was an increase of 259 thousand compared to 2020.

Popular FSR cuisines in Oman witnessed a modest price increase in 5 years, driven by increased demand and a competitive market

- The sales of FSR cuisines increased by around USD 1.1 in 2022 compared to 2017, owing to the increased number of orders per year, which increased to over 81,780 in 2022. The market has become highly competitive, due to which the prices did not increase to a great extent. The number of online orders has increased, and the delivery apps offer special discounts for new customers and large orders, due to which the average order value has only increased by around 4% in 5 years for FSR cuisines. The most popular dishes consumed in the region include kabsa-majboos, which costs around USD 12.45 per 300 g, Kabuli rice, which costs USD 7.8 per 300 g, Shuwa, costing USD 6.4 per 300 g, and Harees, which costs USD 6.8 per 300 g.

- In Oman, 80% of the food consumed was imported, due to which the prices increased by 4% in 2022 compared to 2017. The inflation rate also observed growth which was recorded at 1.55%, with a 2.45% increase compared to the inflation rate in 2020. Popular dishes preferred by the Omani population include kebab, which costs USD 11.3 per 300 g, mushaltat, which costs USD 9.5 per 300 g, and falafel, which costs USD 7.5 per 300 g. The average order value for QSR cuisines increased by 4.347% in 2022 compared to 2017.

- The average order value is increasing Y-o-Y as the meat prices are increasing in the country, and around 70-80% of the FSR and QSR dishes are prepared with meat. In 2022, meat prices witnessed a growth of 7.7% compared to the previous year, resulting in an increase in prices. The per capita consumer spending increased to USD 8,190 in 2021, registering a growth rate of 6.76%.

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Oman Foodservice Industry Overview

The Oman Foodservice Market is fragmented, with the top five companies occupying 4.73%. The major players in this market are Al Daud Restaurants LLC, Jawad Business Group, Khimji Ramdas, LuLu Group International and M.H. Alshaya Co. WLL (sorted alphabetically).

Additional Benefits:

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

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