

United Arab Emirates Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The United Arab Emirates Foodservice Market size is estimated at USD 19.98 billion in 2024, and is expected to reach USD 43.98 billion by 2029, growing at a CAGR of 17.09% during the forecast period (2024-2029).

The high ex-pat population in the country and the rise in online food delivery are fuelling the market growth

- Full service restaurants accounted for the largest share of the market in 2022, with Middle Eastern and Asian cuisine accounting for a 72.60% share. Arabic cuisine, which includes dishes like hummus, shawarma, and falafel, is especially popular in the United Arab Emirates and is frequently offered at many restaurants and food establishments around the country. Due to the large ex-pat population in the United Arab Emirates, there are also many international cuisines available, such as Italian, Japanese, and Chinese. The tendency of restaurants to move toward chef-driven dining has been a key transformation in the post-pandemic UAE F&B sector. The sector is undergoing transition, which is greatly aiding in the promotion of fine dining in the country.

- Cafes and bars are projected to register a CAGR of 13.10% by value in the forecast period. The growth will be supported by the rising consumption of tea and coffee in the country, especially in the specialist tea/coffee sub-segment. A large international ex-pat population has cross-pollinated the UAE market with third to fifth-wave coffee shop concepts from the United States, Europe, and Australia. The United Arab Emirates has the potential and the opportunities to reinvigorate the nation as a center for specialist coffee in the Middle East from all stakeholders.

- The cloud kitchen segment is the fastest-growing among foodservice types, anticipated to register a value CAGR of 17.34% during the forecast period. The growth will be aided by the increasing online food deliveries led by platform-to-consumer services, such as Uber Eats and Deliveroo. The United Arab Emirates has over 400 cloud kitchens. To cater to the opportunities in this space, several restaurant operators have repurposed existing facilities into cloud kitchens or have switched to third-party cloud

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kitchen operators.

United Arab Emirates Foodservice Market Trends

Cafes & bars industry in the United Arab Emirates growing, driven by the increasing population and the thriving tourism industry

- Foodservice outlets in the United Arab Emirates are dominated by cafes and bars, followed by quick service restaurants and full-service restaurants. The number of cafe and bar outlets in the country are expected to grow by 6.72% during the forecast period. This is attributed to the increasing population and the thriving tourism industry. The cafe industry in the country has seen a shift from traditional coffee shops to modern coffee outlets with an increased focus on ambiance and customized service offerings. Major coffee chains are targeting a wider audience by introducing products for kids and health-conscious people. The market has seen rising demand for specialist coffee, such as green coffee.
- Cloud kitchen outlets in the country are projected to register a CAGR of 5.82% in the forecast period. Currently, cloud kitchens represent only 1.05% of the total number of foodservice outlets in the United Arab Emirates, but the number of cloud kitchens is expected to grow significantly soon, with the growth of the online delivery market. The cloud kitchen model has been a preferred option for entrepreneurs and businesses alike since opening one requires lesser capex as well as fixed costs such as labor charges, property taxes, and depreciation.
- The United Arab Emirates is a popular tourist destination, and QSR outlets provide an easy option for visitors unfamiliar with the local cuisine or looking for a quick meal before sightseeing. In 2022, Dubai welcomed 14.36 million international overnight visitors compared to 7.28 million tourist arrivals in 2021. The top QSR chains in the United Arab Emirates are McDonald's, KFC, and Burger King, with 160, 30, and 80 outlets, respectively, as of 2022.

Stuffed camel and al machboos are popular dishes in full service restaurants in the United Arab Emirates

- The average order value was observed to be the highest among full-service restaurants in 2022 compared to other foodservice types, with a price of USD 36.48. This is due to the constant influx of tourists that travel to the country. Foodservice establishments in the United Arab Emirates saw an estimated 5.22% Y-o-Y growth in its average order values in 2023. These consumers have a strong preference for buying local goods and for patronizing small establishments that can do the same in most or all instances. Popular dishes offered by the FSR outlets are Stuffed Camel and Al Machboos, valued at USD 24.5 and USD 17.6 per 300 grams, respectively, in 2022.
- Cloud kitchens are expected to grow at a faster rate in the country. The average order value of cloud kitchens was USD 18.44 in 2022. Cloud kitchens have made it easier for people to place an order. They often collaborate with third-party delivery apps or websites or have their platforms wherein people can place orders. Ordering food is a common practice in Dubai, with more than 60% of people preferring to order food via an app. In the United Arab Emirates, the number of cloud kitchens is increasing with the emergence of notable brands like Kitopi, Kitch, Kitchen Nation, and Kitchen Park.
- The popularity of fast food in recent years has led multinational QSR chains to expand their menus. The United States dominates the fast food industry in the United Arab Emirates, accounting for more than 90% of the non-traditional market. There are nearly 3,100 restaurants in the United Arab Emirates, of which only 94 are fast food outlets. Popular fast food chains in the country are

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Burger King, McDonald's, Kentucky Fried Chicken, Pizza Hut, and local fast food marketers, like the shawarma and breasted chicken outlets that are traditional and modern fast food outlets.

United Arab Emirates Foodservice Industry Overview

The United Arab Emirates Foodservice Market is fragmented, with the top five companies occupying 1.34%. The major players in this market are Americana Restaurants International PLC, Apparel Group, LuLu Group International, M.H. Alshaya Co. WLL and The Emirates Group (sorted alphabetically).

Additional Benefits:

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

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